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Committee on the Costs of Education

interim report number five

*Government
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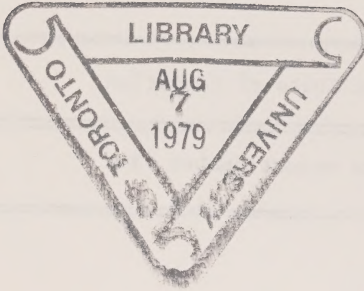
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26 Committee on the Costs of Education

26 interim report number five



Educational Agencies
and Programs

March, 1977

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Organization Development Manager,
The Steel Company of Canada, Limited,
Toronto.

D. C. Trowell,
President,
Shoreacres Broadcasting Company Limited,
Toronto.



To Her Honour

The Lieutenant-Governor of the Province of Ontario

May it please Your Honour:

We, the members of the Committee on the Costs of Education, appointed by Orders-in-Council, dated the 23rd June, 1971, and the 30th June, 1971, to examine the costs of education for the elementary and secondary schools of Ontario in relation to the aims and objectives, programs, priorities, and the like, of the educational system and to evaluate the programs in the requirements of the present day, and in terms of the expenditures of money for them, submit to Your Honour, herewith, a fifth interim report.

A handwritten signature in cursive script, likely belonging to J. C. McTavish.

Chairman

A group of six handwritten signatures in cursive script, arranged in two rows. The top row contains "Paul Brumant", "Hazel Farr", and "Lawrence Kerr". The bottom row contains "W. A. Phillips", "John Ronson", and "D. A. Dravell".

March, 1977



EXECUTIVE COUNCIL OFFICE

OC-1211/71

Copy of an Order-in-Council approved by His Honour the Lieutenant Governor, dated the 21st day of April, A.D. 1971.

The Committee of Council have had under consideration the report of the Honourable the Prime Minister, dated April 20th 1971, wherein he states that,

WHEREAS it is deemed desirable to examine the costs of education for the elementary and secondary schools of Ontario in relation to the aims and objectives, programs, priorities, and the like, of the educational system,

AND WHEREAS there is a need for evaluation of the programs in the light of the experience with them, the requirements of the present day, and in terms of the expenditures of money for them,

The Honourable the Prime Minister therefore recommends that there be established a Committee on the Costs of Education in the Elementary and Secondary Schools of Ontario for the purposes hereinafter mentioned:

- to study the use of the financial resources being provided for elementary and secondary education in Ontario in the attainment of the educational goals;
- to examine the present grant plan to determine if the various differentiating factors such as course, location, level (elementary and secondary), and type (ordinary and extraordinary) generate funds in proper balance consistent with the needs for the attainment of desirable educational objectives;
- to examine the implications of ceilings on expenditures by local school boards, including the effect on the decision-making and autonomy of local school boards;
- to examine the various aspects of school programs with particular reference to innovations and new concepts as, for example, the "open plan" organization, technical and commercial programs, and use of educational technology, with a view to designing and recommending research studies to determine the effectiveness of these concepts in relation to the aims and objectives of education, these studies to be conducted by contract arrangement with research agencies;
- to communicate and consult with groups and organizations repre-

sentative of parents, teachers, trustees, students, and other interested parties;

- after due study and consideration, to make representations and to submit a report or reports to the Government with respect to the matters inquired into under the terms set out herein as the Committee sees fit.

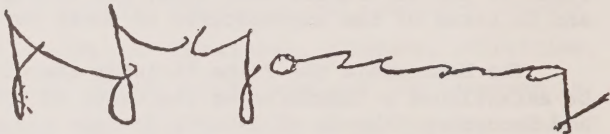
That the Committee be empowered to request submissions, receive briefs and hear persons with special knowledge in the matters heretofore mentioned.

That the Committee be empowered to require the assistance of officials of the Department of Education for such purposes as may be deemed necessary.

That members of the Committee be empowered to visit schools and classrooms in Ontario, by arrangement with local school systems.

The Committee of Council concur in the recommendation of the Honourable the Prime Minister and advise that the same be acted on.

Certified,

A handwritten signature in dark ink, appearing to read 'H. J. Young', written in a cursive style.

Clerk, Executive Council

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PREFACE

There are a number of agencies and programs that are supported financially, in whole or in part, by the Ministry of Education, either directly or through transfer payments. There are others that are the responsibility of school boards. Some of these agencies and programs provide direct services for students and are, therefore, considered to be an integral and essential part of the educational enterprise. Others are only peripherally related to education but are, nonetheless, a necessary part of the total operation. The existence of a few cannot be justified on either count so that they should either be made more functional or abolished altogether.

Since the multiplicity of agencies and programs in education precluded an examination of all of them, the Committee decided to study a representative sampling of the total. Each was considered in relation to its professed goals. The program or programs designed to achieve the goals were reviewed. The effectiveness and efficiency of the organizational structures established to deliver the services were assessed. Judgments were made about the significance of the contribution of each agency or program in terms of the personnel and money allocated to it, the priority that should be given to it in a period of scarce resources and increasing demands for extension of services, and the effectiveness and efficiency of the delivery systems. There is little doubt that some of the comments made about the sample group can be applied with equal or greater force to other agencies and programs not reported on in this study.

A first requirement of any agency or program is that it have a set of goals to give direction to its activities. In education it is imperative that these goals be articulated so that they are understood and accepted by the public who provide the financial resources and by the personnel whose responsibility it is to achieve them. In too many cases, goals are either non-existent, or lacking in clarity, or ignored in practice. The results in such a situation are predictable - lack of direction, management by crisis, *ad hoc* decision-making, loss of confidence, low morale, waste of money, conflict and confrontation, and demands for radical reform. Examples of these characteristics will be evident to some degree in at least a few of the agencies and programs considered in this Report.

The organization and management of an educational agency for the delivery of its services can have a significant impact on the quality of the program provided. There is a tendency for bureaucratic structures to develop sclerotic characteristics that find expression in a number of ways. Among these may be included the perpetuation of programs and procedures no longer applicable to new circumstances; reliance for solutions to current problems on reversion to "tried and true" methods and practices of an earlier era; loss of any clear direction for their activities; persistence of an organization for its own sake apart from the purposes for which it was created; and ultimately the absence of any real need for its continued existence. Where these evidences of aging are present in an organization, it is bound to be less effective and more inefficient than the society for its own sake will or can countenance. The secondary symptoms represented by rigidity, apathy, decay, senility and progressive deterioration lead to eventual demise of the "sick" organization. Again, we have identified some agencies and programs to which this description applies to a lesser or greater degree.

A healthy organization can, however, have a highly positive impact on the educational experiences of children. To achieve and maintain this state, it is essential that signs of deterioration be recognized early, that diagnosis of the causes be made promptly, that the findings of new knowledge and research be applied, and that deliberate, skilful, and sensitive steps be taken to maintain the health of the organization, or at least to minimize the negative impact of any potential danger to the organism.

Because the health of an organization depends on people, it is of first importance that it have regard for people. The organization must provide an environment where growth can take place, whether it be of students, teachers, supervisors, administrators, parents, trustees, or members of the general public. That environment must ensure respect for the individual; it must ensure that it applies what is known about the way people grow and develop, not only physically but also mentally, emotionally, intellectually, socially and culturally; it must exemplify in all its relationships those characteristics that are inherent in the democratic ideal. It is recognized that there are many other important requirements for a good total learning environment but if an organization is to operate successfully

these are significant considerations in the process. They can contribute to the establishment of an environment that is conducive to the development and expression of the creative mind, to the nurture of the innovative spirit, to the fostering of the experimental researcher, and to the encouragement of the imaginative soul. In these ways the organization can incorporate within itself the capability for self-renewal. It is understood that attainment of the ideal may be difficult and remote. To the extent that advances are made along the continuum in the direction of the ideal, progress will have been achieved. The maximum possible progress is the objective we would like to see realized. That is all we are proposing.

In our study of educational organizations and programs, we found examples representative of the whole spectrum of organizational health from vibrant well-being to almost fatal *malaise*. But there were too many examples of "sick" organizations where opportunities for creativity, innovation, experimentation and the use of imagination are almost totally lacking, where conformity and unquestioned adherence to bureaucratic directives handed down from above are considered virtues, where regard for the individual personality and circumstance is minimal or non-existent, where morale is so low that apathy and a "don't care" attitude are predominant, where non-involvement, secrecy and fear are prevalent, where the appearance of action to solve problems is achieved through almost constant reorganization rather than through the substantive changes that are required.

There is considerable evidence to support the conclusion that little of a positive nature is being done to achieve organizational good health and to overcome the problems and difficulties confronting education to-day. There is a reluctance on the part of most professional personnel to develop new initiatives. The absence of positive action to solve problems only increases frustrations and sharpens the criticism. There is lack of awareness on the part of many educational authorities of developments in research and experimentation that if applied wisely and discreetly might alleviate or at least minimize many of the difficulties. There is a reluctance among administrators to involve the public in the decision-making process either on the basis that the public is incapable of making a significant contribution or because administrators fear that they will lose their "control". Some administrators react in the same manner towards the elected trustees

in their jurisdictions. In either case, some administrators are out-of-touch with the reality of the day and are only deferring temporarily the achievement of a more responsive and responsible school system.

We understand fully that adaptations in the educational system must take place in interrelated political, economic, social, and cultural circumstances. We are also aware that the good of society and the school system require that decisions be taken which cannot always ensure full support of the various groups involved and that these "hard" decisions must be taken if we are to move closer to the ideal than we have in the past. Acceptance of these conditions and possession of the fortitude to take the actions required is sometimes described as "leadership". We can do no less than utilize what we already know in order to provide the environment for a great education. What we need to do is "let our minds conclude what the facts conclude".

We have drawn on a multiplicity of sources for information and data about the agencies and programs reported on in this study. Documents prepared and released by the several agencies have proven most helpful and have been utilized extensively. Consultation with officials added considerably to our understanding of the needs, goals, programs, and organizational structures with which they were involved. The frankness with which all our questions, including those of the most searching nature, were answered enabled us to secure a feeling for the operational climate existing in the organizations under review. The detailed knowledge of and the insightful comments about the various agencies and programs by those most closely associated with them contributed greatly to our understanding and appreciation of the tasks they were attempting to perform and of the problems they were encountering in their efforts to fulfill their responsibilities. We have monitored developments over a sufficiently long period of time to enable us to gain some perspective about the significance, effectiveness and efficiency of the various agencies and programs.

We are most grateful to all the officials for their generous cooperation and unfailing courtesy. In particular, and without minimizing the contributions of the representatives of the other agencies, we wish to thank the personnel of the Ministry of Education. Because of the pervasive extent

of the Ministry's involvement in the total educational enterprise, our requests of its officials were more frequent and the work of providing answers more onerous. Not once did we encounter any reluctance to meet our enquiries as fully as circumstances permitted. Extensive interviews were conducted with the Deputy Minister of Education, the Assistant Deputy Ministers, the Directors of the numerous Branches, and some of their supporting staffs, including representatives of the Regional Offices. These meetings were most helpful.

We are, of course, wholly responsible for the interpretations we have placed on the information and data provided to us and for the recommendations resulting from our analysis and conclusions.

CHAPTER 1

FINDINGS, CONCLUSIONS, AND RECOMMENDATIONS

A. Teachers' Superannuation Fund (Chapter 2)

(a) Liabilities and Commitments

The Teachers' Superannuation Fund was established on April 1, 1917. From its inception it had an unfunded liability which, by December 31, 1966, had increased to \$328,282,000. This "initial" liability was created because the contributions to the Fund were inadequate to finance the combination of benefits provided between the years 1917 to 1966 and the commitments made during that period to future pensioners. No provision exists for the amortization of the amount of \$328,282,000. The Province of Ontario is committed to payment of interest at the rate of six per cent on this sum or \$19,696,920 annually. This payment must be made from the Consolidated Revenue Fund of the province to which all taxpayers contribute.

During the six-year period from January 1, 1967, to December 31, 1972, inclusive, an additional liability of \$229,595,000, known as the "residual" unfunded liability, was created. The actuaries reported that this increase in unfunded liabilities was due to plan amendments providing additional benefits. Under the provisions of The Pension Benefits Act, 1965, this liability must be amortized by annual payments of principal with interest at six per cent per annum. This means that the minimum payment must be \$21,913,650 per annum during the seventeen-year period ending December 31, 1989. Since no additional contributions were required of teachers to finance the additional benefits, the whole amount of \$21,913,650 must also be paid from the Consolidated Revenue Fund of the province.

The combined payment by the province for the two liability items is \$19,696,920 plus \$21,913,650, or \$41,610,570 for each year from 1973 to 1989 inclusive, and \$19,696,920 per year thereafter.

The province has a number of other commitments to the Fund. For example, under Section 8 of The Teachers' Superannuation Act, when payments

into the Fund in any year are insufficient to make the required payments out of the Fund to pensioners, the deficiency must be made out of the Consolidated Revenue Fund of the province. This provision is not operative at the present time because the sums received from contributing employed members and the matching payments by the province are greater than the current payments to those already on pension. It is, however, quite possible that other direct payments by the province will be necessary in the future when the many additional teachers who began service in the 1950s and 1960s retire on pension.

Any further unfunded liability created by an experience deficiency in the future will also have to be amortized by payments by the province from the Consolidated Revenue Fund. Given the substantial increase in salaries of teachers in recent years, it is inevitable that an experience deficiency will result because of the calculation of each pension on the basis of the average salary of the recipient for the best seven years of employment. Benefits resulting from experience prior to the seven years when salaries were lower were not fully funded by the amount of the contributions during that earlier period.

In addition to the commitments referred to above, the province, beginning in 1967, granted a number of subsidies to pensioners of the Fund. Since no provision had been made by the contributors during their working years to the funding of these benefits, the total cost has had to be borne by the Consolidated Revenue Fund of the province. These subsidies take the form of guaranteed minimum pensions at a higher level than the calculated pension would provide and of increases in the calculated pension to compensate in whole or in part for the effects of inflation. The province is committed to the continued payment of these subsidies for all pensioners who retired prior to September, 1975, at the rates established in The Superannuation Adjustment Benefits Act, 1975. The total cost of these benefits to the Consolidated Revenue Fund of the province to 1975 was \$38,995,525.42. The estimated costs for 1975-76 and 1976-77 are \$17,050,000 and \$25,649,400 respectively, for a total for the latter two years of \$35,572,000. Thus, by the end of 1976-77, the special subsidies will have cost the province an estimated \$74,567,525.42. No estimate of the future costs of these subsidies to

the Consolidated Revenue Fund of the province beyond 1976-77 is available at the present time.

A large part of the cost of special subsidies and increased benefits for pensioners of the Teachers' Superannuation Fund is borne by all taxpayers in Ontario. Similar benefits are provided from the Consolidated Revenue Fund through the Public Service Superannuation Fund for pensioners who were employees of the province during their working years. In both cases, contributors to their respective Funds did not make payments sufficiently large enough to fund these additional benefits. As a result, all taxpayers are paying to provide extra benefits to recipients of pensions from the two Funds. The great majority of retired taxpayers have not received adjustments in the amount of their pensions from private pension plans so that, by comparison, they do not fare nearly as well as pensioners from the two Funds.

The magnitude of the contributions by the province to the Teachers' Superannuation Fund are set out in Table 11. In 1974-75, because of the inclusion of some deferred payments from previous years, the total amount was \$202,996,079. For 1975-76 and 1976-77, the estimated payments are \$128,769,900 and \$153,077,900 respectively.

The present benefits under The Teachers' Superannuation Act are among the most generous of any provided in the public and private sector. Some of these benefits were not funded by the contributions of pensioners during their working years. The granting of additional and extended benefits has resulted in residual unfunded liabilities to be financed from the Consolidated Revenue Fund of the province. It is our view that the Province of Ontario has granted substantially increased benefits to contributors to the Teachers' Superannuation Fund without due consideration for the impact of these concessions on the finances of the province. An example is the commitment to a residual unfunded liability of \$229,595,000 in six years, wholly because of increased and extended benefits.

WE RECOMMEND,

(1) THAT NO EXTENSION OF BENEFITS IN EXCESS OF THE PREVAILING LEVELS BE GRANTED BY THE PROVINCE UNTIL THE RESULTS OF THE ACTUARIES' REPORT FOR THE PERIOD ENDED DECEMBER 31, 1975, AND THEIR PROJECTIONS, ARE KNOWN; AND THAT THE COST OF ANY FURTHER CONTEMPLATED IMPROVEMENTS IN BENEFITS BE CALCULATED AND MADE KNOWN TO THE PUBLIC TOGETHER WITH PLANS FOR THE FUNDING OF ANY SUCH EXTENSION OF BENEFITS.

(b) Payment of Employers' Share of Contributions

Nearly all the contributors to the Teachers' Superannuation Fund are in the employ of school boards. It is an anomaly that the Province of Ontario makes the employers' contribution to the Fund on behalf of teachers who are not its employees. The province does not make the employers' contributions to the Ontario Municipal Employees Retirement System for non-teaching employees of school boards who are members of the latter pension plan. It is our view, therefore, that it is time the province surrendered its involvement in direct payments to the Fund on behalf of teachers and that this function should be assumed by the actual employers - the school boards. If this were done, expenditures by school boards would more accurately reflect the cost of education at the local level than is now the case when the employers' contributions are not included.

If the province were to adopt the proposal to have school boards assume responsibility for payment of the employers' contributions to the Fund, the amount of such payments would be included by boards in recognized ordinary expenditures for grant purposes. Consequently, the expenditure per pupil for grant purposes would have to be increased by an amount equivalent to the increased expenditure per pupil resulting from assumption by boards of payments of the employers' contributions.

By itself, the procedure described in the previous paragraph would result in a substantially reduced payment by the province from its present

level of support to the Fund. Because the province is already committed to payment of 100 per cent of the employers' contributions, it should in each year in the future add to the general legislative grants an amount equivalent to the commitment it now has for payment of the employers' contributions. This amount is estimated at \$85,815,600 in 1976-77 and will be greater in subsequent years. This same procedure was adopted when school boards were required to assume responsibility for the employers' contributions on behalf of teachers to the Canada Pension Plan in the late 1960s.

The provisions recommended for the payment of the employers' contributions to the Teachers' Superannuation Fund apply with equal force to payments made on behalf of teachers under The Superannuation Adjustment Benefits Act, 1975.

WE RECOMMEND,

(2) THAT, EFFECTIVE JANUARY 1, 1978, THE MINISTRY OF EDUCATION TRANSFER TO SCHOOL BOARDS RESPONSIBILITY FOR MAKING THE EMPLOYER'S CONTRIBUTIONS TO THE TEACHERS' SUPERANNUATION FUND FOR TEACHERS IN THE EMPLOY OF SCHOOL BOARDS; THAT THE RECOGNIZED ORDINARY EXPENDITURE BY SCHOOL BOARDS BE INCREASED BY AN AMOUNT EQUIVALENT TO THE EXPENDITURE REPRESENTED BY THE EMPLOYER'S CONTRIBUTIONS TO THE FUND; AND THAT AN AMOUNT EQUIVALENT TO THE TOTAL AMOUNT OF THE EMPLOYERS' CONTRIBUTIONS TO THE TEACHERS' SUPERANNUATION FUND BE ADDED TO THE TOTAL AMOUNT OTHERWISE ALLOCATED BY THE PROVINCE FOR GENERAL LEGISLATIVE GRANTS.

(c) The Commission

The Teachers' Superannuation Commission is composed of six members appointed by the Minister of Education and five members elected by the affiliates of the Ontario Teachers' Federation. To a large extent the Commission, as presently organized, is merely a legitimating agency, under the control of the government, for administrative practices and

procedures, with little or no policy-making function. Determination of policy is by negotiation between the government, represented by the Minister of Education, and the Ontario Teachers' Federation. This arrangement has been the source of considerable criticism by the profession in areas having to do with such matters as rates of interest paid by the government on borrowings from the Fund and control over the types of investment available to the Fund. There is a feeling that if these limitations were removed, the Fund could increase its revenues substantially.

At the same time, the Ontario Teachers' Federation has sought improvements in the benefits provided by the Fund and has been successful in achieving many of its goals. As is evident from the present financial status of the Fund, the necessary monetary resources to pay for increased benefits has not been provided.

It is our view that the Commission should be reorganized to include representation from other interested segments of the community in addition to those of government and the teaching profession. The reorganized Commission should be given responsibility for the development of policy, including that of investment of the Fund's assets, as is the case, for example, with the Ontario Municipal Employers Retirement System. It should also be responsible for determination of benefits and for the funding of those benefits apart from the Consolidated Revenue Fund of the province.

WE RECOMMEND,

(3) THAT THE TEACHERS' SUPERANNUATION COMMISSION CONTINUE TO FUNCTION AS A PROVINCIAL BODY BUT THAT IT BE REORGANIZED ON A MORE REPRESENTATIVE BASIS WITH GREATER RESPONSIBILITY FOR THE CONDUCT OF THE FUND BEING GIVEN TO THE COMMISSION WITHIN CONTROLS APPLICABLE TO OTHER PENSION PLANS AND WITH ANY IMPROVEMENT OF BENEFITS IN THE FUTURE BEING FUNDED APART FROM THE CONSOLIDATED REVENUE FUND OF THE PROVINCE.

B. The Ontario Institute for Studies in Education (Chapter 3)

The Institute was founded by an Act of the Legislature in 1965 to study matters and problems relating to or affecting education, to disseminate the results of and assist in the implementation of the findings of educational studies, and to establish and conduct courses leading to certificates of standing and graduate degrees in education. It incorporated the research and graduate studies components of the then Ontario College of Education. A third element was the Ontario Curriculum Institute which merged with the new organization.

Until the Institute was founded, the emphasis on research in education in Ontario was negligible. Little effort was made to disseminate research findings from other jurisdictions to the schools of the province. While some provision existed for graduate study, it was limited in scope and, for the most part, inadequate in quality since it lacked a base in scholarly research. These results were inevitable given the low level of financial support provided before 1965.

In the second half of the decade of the 1960s, financial resources of greatly-increased magnitude were allocated to the Institute. It may well have been that these amounts were excessive in terms of their impact on the possibility of sound planning and controlled expansion. Given the need for greater economy in the 1970s, it was inevitable that the financial resources provided to the Institute by government would be subject to more critical review and control. In 1971, the government instituted a planned reduction in the amount of its block grant and the Institute implemented major cutbacks in its expenditures.

After its initial years and the growing pains associated with its rapid expansion, the Institute has overcome many of its problems. It has achieved a recognized reputation for the quality of its research, for the soundness of its provision for dissemination through its field centres, and for the excellence of its graduate programs. It possesses a library unmatched in Canada for the number and significance of its holdings. The Institute has made substantial progress in terms of the positive impact it has had on education in the schools. The Institute

provides Ontario with an educational asset of tremendous potential for further improvement of education in this province and the prospects for realization of that promise are good, if certain conditions are met.

There is, however, a lack of clarity between the goals of the Institute as set out in the legislation sponsored by the government in 1965, and the level of financial support provided by the government at the present time for research and development and field development. The result is uncertainty about the future of the Institute, concern about the nature and extent of research as a basis for graduate programs, and doubt about the ability to maintain the field centres in their work of dissemination and service to the schools. Unless there is some resolution of these problems, there is a real possibility that the quality of programs in the Institute, achieved at great expenditure of time, effort and money, will be dissipated through the loss of highly-qualified professional staff and other personnel. This is a development which education in Ontario can ill afford.

WE RECOMMEND,

(4) (A) THAT THE MINISTRY OF EDUCATION CONTINUE TO SUPPORT RESEARCH AND DEVELOPMENT AND FIELD DEVELOPMENT IN EDUCATION AT THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATION;

(B) THAT THE MINISTRY OF EDUCATION IN CONSULTATION WITH THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATION DEFINE THE ROLE OF THE INSTITUTE IN THE AREAS OF RESEARCH AND DEVELOPMENT AND FIELD DEVELOPMENT;

(C) THAT THE MINISTRY OF EDUCATION ENTER INTO AN AGREEMENT WITH THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATION INCORPORATING THE DECISIONS REACHED AS A RESULT OF IMPLEMENTATION OF RECOMMENDATION (B), AND INCLUDING PROVISIONS FOR FUNDING THESE ASPECTS OF THE INSTITUTE'S WORK.

C. The Ontario Educational Communications Authority (Chapter 4)

(a) The Ontario Educational Communications Authority was established by an Act of the Legislature in June, 1970. Almost from its inception, and continuing for several years, the Authority has experienced numerous organizational difficulties. Several studies have been made and reports submitted. We had no desire to duplicate that work but there is one particular aspect about which we feel strongly. At the present time, the positions of chairman, director, and chief executive officer of the Authority are held by one person. This is an unworkable arrangement for reasons which we elaborate on later in this Report.

WE RECOMMEND,

(5) THAT THE POSITION OF CHAIRMAN OF THE ONTARIO EDUCATIONAL COMMUNICATIONS AUTHORITY AND THE POSITION OF CHIEF EXECUTIVE OFFICER OF THE AUTHORITY BE SEPARATED WITH THE CHIEF EXECUTIVE OFFICER NOT A MEMBER OF THE BOARD OF DIRECTORS,

(b) There have been tremendous changes in society and in education since the Authority was established in 1970. In particular, developing technology in educational television has introduced many innovations. Methods of delivery of programs have undergone a transformation and plans for extension have been implemented or are contemplated. The organizational structure to deliver services has been altered several times. The extent of utilization of educational television in the schools has not been established with any degree of accuracy. Where it is used, there is little evidence of its impact on the educational program. In a period when it is essential that scarce resources be allocated on a priority basis, in terms of their positive contribution to the attainment of educational goals, the justification for expenditure for educational television is at best unsubstantiated and at worst non-existent.

As a result of developments since 1970, and having regard for the circumstances that now exist, it is our view that the original mandate of

the Authority should be reviewed. We propose that an objective, in-depth study should be conducted by an independent commission. Without intending to suggest limitations on the terms of reference of the proposed commission, we believe they should include a consideration of the goals of the Authority, the relationship of those goals to educational goals, the nature of the programming provided for both in-school and out-of-school audiences, audience appeal, participation, and ratings as measured by independent authorities, the impact of educational television on the goals of education as determined by established criteria, the place of educational television among priorities for the attainment of educational goals, the allocation of personnel and money to educational television in a period of scarce resources, the efficiency and effectiveness of the present organizational structure to deliver services, and the relationship of educational television to commercial television.

It is also our view that the study we recommend should be begun immediately before any additional commitments are made in terms of facilities or extension of services and that decisions in these areas should await the recommendations of the proposed commission.

WE RECOMMEND,

(6) THAT THE PROVINCE ESTABLISH IMMEDIATELY AN INDEPENDENT AND OBJECTIVE COMMISSION TO MAKE A STUDY AND REPORT ON THE AUTHORITY'S PERFORMANCE DURING ITS YEARS OF OPERATION INCLUDING, BUT NOT LIMITED TO, THE AREAS REFERRED TO IN OUR REPORT; AND THAT IT MAKE RECOMMENDATIONS FOR ANY FUTURE ROLE OF EDUCATIONAL TELEVISION IN ONTARIO;

D. Ministry of Education (Chapter 5)

Under the provisions of The British North America Act, 1867, responsibility for education was assigned to the provinces. Because of the pioneer nature of the society and the lack of sophistication about the provision of education at the local level, it ultimately became necessary and appropriate to establish a strong central authority in education. The purpose of this action was to achieve a basic minimum standard for the school system. It is important to recognize that for almost a century the Department of Education functioned to ensure that minimum standards were met and that to achieve this goal emphasis was on uniformity. In this climate there was little initiative to introduce programs designed to achieve in excess of minimum standards.

Prior to the establishment of the strong central authority, there had been a tradition of local autonomy in education characterized by the responsibility and authority exercised by elected school boards. Consequently, the central authority and school boards coexisted and shared responsibility for the conduct of the educational program. In the area of educational finance, as late as 1941, school boards in Ontario were raising 84 per cent of the cost of education through local taxation and the Department of Education was providing only 16 per cent through legislative grants.

The provision of high quality education is an essential objective in modern society. This involves much more than attainment of a basic minimum standard. School boards and the Ministry of Education must continue to work cooperatively towards the goal of the best possible education for all children. Each level of government must respect the role and contribution of the other. The tradition and expectation of a strong local voice in education must not be eroded through arbitrary imposition of authority or subtle seizure of control by the central agency, for whatever reasons. The leadership role of the Ministry of Education can best be exercised by the performance of those functions which no other agency is equipped to provide and by the provision of the necessary resources of personnel and finances that school boards are unable to supply without some provincial assistance. Division of responsibility and authority

along these lines is the best assurance that progress towards high quality education will be realized.

During the last decade there has been a developing desire on the part of citizens in local communities to participate in the decision-making process in the resolution of issues that affect the quality of life in their neighbourhoods. In spite of a few inevitable extreme positions taken, due partly to inexperience and as a factor in the learning process, this involvement of citizens in the democratic process is a highly positive contribution to the quality of the decisions made. The process recognizes and makes provision for the unique characteristics and special problems that exist in the highly divergent nature of communities across a province as vast as Ontario. It is unlikely that the differing results and procedures will appeal to the bureaucratic mind which emphasizes neatness and tidiness in the organization and operation of administrative structures and which puts a premium on uniformity and conformity in the name of "equality" of treatment. It is against just such centralist tendencies that citizen involvement at the local level is a most promising concept and a strong force to ensure perpetuation of the qualities of a democracy that make it the best form of government yet devised. It is in periods of criticism and difficulties that higher levels of governments tend to abrogate to themselves the authority and responsibilities of lower levels of government. To some extent this is where we are in education in Ontario today. But there is no assurance that higher levels of government can do the job better. Indeed, almost all the evidence and experience dictates the opposite. It is, therefore, important to maintain the role of school boards and local organizations in educational decision-making.

WE RECOMMEND,

(7) THAT THE MINISTRY OF EDUCATION REAFFIRM ITS EARLIER COMMITMENT TO THE PRINCIPLE OF DECENTRALIZATION OF DECISION-MAKING IN EDUCATION TO THE MAXIMUM EXTENT POSSIBLE SO THAT PEOPLE AT THE LOCAL SCHOOL BOARD, SCHOOL, AND COMMUNITY LEVELS MAY PARTICIPATE IN THE DETERMINATION OF MATTERS WHICH AFFECT EDUCATION IN THEIR AREAS;

Governments have an obligation to provide leadership. But leadership by a democratic government does not imply the determination of policy by administrative directives or the exercise of arbitrary authority by higher levels of government towards those agencies with whom responsibility for the conduct of public business is shared. True leadership in education in particular is demonstrated when higher levels of government accept responsibility for those functions which they alone can perform and when lower levels of government or other educational agencies are given authority and responsibility for the remaining functions, with the central authority providing the essential resources of personnel and finances. For example, the Ministry of Education must ultimately decide the legislation that it will present to the Legislature, it must determine the amount of general legislative grants that it will request and the method of their distribution, and it must certify teachers, principals, and supervisory officers. No other body is able to perform these functions. If the Ministry were to confine its direct involvement and responsibility to areas of this kind, it would be in a position to perform them effectively and efficiently, unencumbered by involvement in matters that other bodies can perform with greater possibility of success.

There are numerous functions which can and should be the responsibility of other educational agencies. For example, each school board has a knowledge and awareness of the local situation that enable it to decide the programs to be offered, the curriculum development to be conducted, and the evaluation to be made. If certain boards lack the personnel resources to enable them to perform these functions, the leadership role of the Ministry should ensure that the necessary resources are available on request.

An example of the Ministry's unnecessary direct involvement in certain areas is its conduct of teacher education programs in Toronto and Hamilton and its continued sponsorship of summer courses for teachers. Faculties of education are especially qualified to offer these programs and are doing so in several centres. The Ministry should divest itself of its remaining direct involvement and transfer responsibility to faculties of education.

WE RECOMMEND,

(8) THAT THE MINISTRY OF EDUCATION RETAIN DIRECT RESPONSIBILITY FOR FUNCTIONS WHICH ONLY IT CAN PERFORM (E.G. LEGISLATION; GENERAL LEGISLATIVE GRANTS; CERTIFICATION OF TEACHERS, PRINCIPALS, SUPERVISORY OFFICERS); THAT THE MINISTRY DIVEST ITSELF OF DIRECT RESPONSIBILITY FOR THE ORGANIZATION AND ADMINISTRATION OF PROGRAMS THAT ARE WITHIN THE AREA OF COMPETENCE AND EXPERTISE OF OTHER EDUCATIONAL AGENCIES (E.G. SCHOOL BOARDS AND CURRICULUM DEVELOPMENT; FACULTIES OF EDUCATION AND BASIC TEACHER EDUCATION AND SUMMER COURSES FOR TEACHERS); AND THAT THE MINISTRY FULFILL ITS LEADERSHIP ROLE THROUGH CONSULTATION AND LIAISON WITH INTERESTED EDUCATIONAL ORGANIZATIONS, THROUGH ENCOURAGEMENT OF EXPERIMENTATION AND RESEARCH, AND BY THE PROVISION OF HIGHLY-QUALIFIED RESOURCE PERSONNEL MADE AVAILABLE TO SCHOOL BOARDS AND OTHER EDUCATIONAL AGENCIES ON THEIR REQUEST.

The Ministry of Education, at the end of the fiscal year on March 31, 1975, had in its employ 1,821 regular staff and several hundred contract staff. A substantial proportion of the total was engaged in institutions providing educational programs and services for students who are deaf or blind. Others were assigned to regional centres providing services on a decentralized basis. The essential nature of these programs justifies the allocation of staff sufficient to achieve their purposes.

There is, however, a heavy concentration of professional staff and support personnel in the central office of the Ministry of Education in Toronto. We have identified examples of unnecessary duplication in organization and programs and of overstaffing in our more detailed comments in Chapter 5. Part of the problem arises because the central office staff has not been reduced in number in accordance with the stated policy of decentralization of the delivery of services. This accounts in part for excessive costs in certain branches and sections of the central office.

Excessive staffing at the head office inevitably creates confusion and chaos about the policy of the Ministry regarding the degree of central control and the role of the regional offices as a decentralized arm of the Ministry. In this circumstance, it is easy for the central staff to seize control and to reduce the potential effectiveness of the personnel in the regional offices. The present situation is, therefore, wasteful and highly destructive of the morale of staff in regional offices. Elimination of unnecessary positions at the central office level would do much to clarify the role of personnel in regional offices and would provide them with the opportunity to realize their potential in the delivery of educational services. At the same time, financial savings of substantial proportions could be achieved.

WE RECOMMEND,

(9) THAT THE MINISTRY OF EDUCATION CONDUCT A THOROUGH AND OBJECTIVE REVIEW AND ASSESSMENT OF POSITIONS AND NUMBER OF STAFF EMPLOYED IN EACH OF ITS DIVISIONS, BRANCHES, SECTIONS AND OTHER UNITS IN ITS CENTRAL OFFICE IN TORONTO WITH A VIEW TO ELIMINATION OF ANY DUPLICATION OF PROGRAMS AND DUTIES, OF REDUNDANT STAFF, AND OF NON-ESSENTIAL EMPLOYMENT.

Most departments of government have developed information services designed to keep the public informed of their policies, activities, and services. In matters of political significance to the government, it is unrealistic to expect that the reporting will have a high degree of objectivity. There are other areas, however, where it is important for the Ministry of Education to communicate with the schools, boards of trustees, a wide variety of other educational organizations, and the general public. The Communication Services Branch is charged with responsibility for both areas. Undoubtedly, there is a need for some of the services which are performed by the Branch. There is a question, however, about the necessity and even the desirability of the extent and level of the services now being provided.

During the 1970s, there has been a substantial increase in the number of staff and the costs in the Communication Services Branch. Some of this can be attributed to transfer of personnel and services from other divisions and branches but, after making allowances for these adjustments, considerable expansion has still taken place. Given the present economic circumstances, the necessity to achieve economies wherever possible, and the scarcity of financial resources for educational programs in the schools, it seems that the level of support for the Communication Services Branch is disproportionately high and insensitive to the need for funding of higher priority areas.

WE RECOMMEND,

(10) THAT, IN PARTICULAR, THE MINISTRY OF EDUCATION REVIEW THE PROGRAMS AND ACTIVITIES OF THE COMMUNICATION SERVICES BRANCH AND THAT IT JUSTIFY THE STAFF ALLOCATION AND EXPENDITURES INVOLVED IN THE LIGHT OF EDUCATIONAL PRIORITIES AND THE LIMITED FINANCIAL RESOURCES AVAILABLE.

During recent years the Ministry of Education has conducted a number of studies of its organizational structure. Implementation of recommendations contained in these reviews has resulted in transfers of some programs and reallocation of personnel. For the most part, the changes in programs have been inconsequential embodying, for example, new titles for administrative units or return to former designations. There have been few instances where alterations of a substantive nature have been made.

There have, however, been a large number of changes affecting individual employees, particularly among professional educational personnel. Staff members with expertise in a particular field have been transferred to other positions which are wholly unrelated to their speciality and about which they know little or nothing. A case can be made for the provision of a wide range of experience as preparation for possible promotion to a more senior post. But indiscriminate use of transfers can

be upsetting, destructive of morale, unproductive, and wasteful.

The arbitrary assignment of personnel without adequate regard for their professional preparation, interests, career goals, and personal factors is also negative in its impact. It is, of course, impossible in a large organization to meet in detail all the personal wishes and desires of each staff member. The purposes and goals of the organization do not always coincide with personal ambitions of its employees. There is, however, the need for sensitivity to the personal factors affecting each employee if he is to make a maximum contribution to the attainment of the organization's goals.

If an employee is to maintain high morale, he must feel that he is respected as an individual and that he is making some worthwhile contribution to the organization. He must feel that his professional competence is recognized and that his views in the area of his expertise are sought and considered. He must see himself as part of a team working towards the attainment of some educational goals. He must understand and accept the fact that other considerations may have to be taken into account in reaching decisions, as, for example, political factors. As long as results are beneficial in terms of improvement of the educational enterprise, the professional is most often likely to be highly supportive of the decisions made by his political masters. If, however, the main thrust is the attainment of political objectives regardless of their impact on the improvement of education and if there is an almost complete disregard of the factors that impinge on the personal life and performance of the employee, it is inevitable that there will be uneasiness, uncertainty, suspicion, and dissatisfaction on his part.

It is our view that the numerous organizational studies, the juggling of programs and titles, and the manner in which staff have been dealt with in the Ministry of Education have created a morale problem. Many staff have become so introspective that it is unlikely they can function at a level anywhere near their potential. It will require major adjustments in administration and management if the difficulties described are to be reduced in magnitude or eliminated.

WE RECOMMEND,

(11) THAT THE MINISTRY OF EDUCATION HAVE REGARD FOR SOUND PRINCIPLES OF PERSONNEL MANAGEMENT IN RELATIONSHIPS WITH ITS STAFF IN THE INTERESTS OF MAINTENANCE OF MORALE, OPTIMUM UTILIZATION OF PERSONNEL, AND ECONOMY OF EXPENDITURE; AND THAT IN THE APPOINTMENT OF AN EMPLOYEE TO A POSITION CONSIDERATION BE GIVEN TO PROFESSIONAL PREPARATION, CAREER INTERESTS AND GOALS, COMPATIBILITY WITH JOB REQUIREMENTS, AND PERSONAL FACTORS.

The management organization of any enterprise should be so designed and structured that it will enable the undertaking to achieve its goals with, among other considerations, reasonable economy of time, effort, and expense. In the case of the Ministry of Education there is a need for a clear statement of a set of realistic goals and a declaration of the means by which they may best be achieved. For example, if there is to be recognition of individual differences among children and if the goal is to provide the best possible educational program for each child, then statements and actions by the central authority implying uniformity and conformity on a provincial-wide basis are inconsistent and contradictory. Since effective attainment of many of the generally-accepted goals of education require that responsibility and authority rest with school boards, the design and structure of the management organization of the Ministry of Education should reflect this fact.

Clarification of the respective roles of the Ministry of Education and school boards in pursuit of educational goals will do much to remove the existing confusion about curriculum development, administrative jurisdiction, and responsibility and accountability. It should also enable the Ministry to perform its functions with a greater degree of stability in its organization and without a continuing series of shifts and transfers of programs, re-designation of names and titles of activities and staff positions, and shuffling of staff.

WE RECOMMEND,

(12) THAT THE MINISTRY OF EDUCATION ESTABLISH AN ORGANIZATIONAL STRUCTURE DESIGNED TO ACHIEVE THE GOALS OF THE MINISTRY IN A DECENTRALIZED SYSTEM; THAT HAVING CREATED SUCH A STRUCTURE THE ORGANIZATION CONTINUE IN OPERATION FOR A PERIOD OF TIME SUFFICIENTLY LONG TO ENABLE IT TO DEMONSTRATE ITS CAPABILITIES WITHOUT UNNECESSARY AND ALMOST CONSTANT REORGANIZATION TO INCORPORATE NON-SUBSTANTIVE CHANGES SUCH AS RENAMING OF UNITS, TRANSFER OF RESPONSIBILITIES AMONG UNITS, AND SHUFFLING OF STAFF.

The initial efforts to provide some modicum of education for children in the pioneer society in Ontario in the early nineteenth century were put forth by a few parents or by the churches. Later, as more parents were able to concern themselves with matters other than survival, the demand for education for their children grew. Ultimately, as has already been pointed out, there was a need for a strong central authority to ensure that minimum acceptable standards were established. These developments led to the creation in 1876 of the Department of Education with its own Minister of Education.

The establishment of minimum standards and the desire to see them achieved led to a number of other developments based on uniformity and conformity. These included, among others, the appointment of school inspectors, the establishment of qualifications for teachers, and the passing of legislation setting out duties and responsibilities of school boards. Associated with these steps were the introduction of standard provincial courses of study, a fixed body of content to be learned, an approved single text-book for each subject, and emphasis on rote learning, the requirement of a substantial amount of homework from the earliest years, formal examinations in the earliest classes and uniform external examinations in the higher forms, emphasis on marks, rank ordering of pupils by class, rigid grade boundaries, promotion or non-promotion at the end of the school year only, and exclusion from further education

at an early age for those who "failed".

During the period between the establishment of these patterns and the mid-1930s, a great deal was learned through research and experimentation about the way children grow and develop, about the way they learn, about the importance of the process of education in the preparation of young people for life in a democratic society, about the way change in education takes place, and much more. Beginning in the late 1930s, the then Department of Education introduced substantial changes in curriculum, teaching methods, and the organization of administrative units at the school board level. With varying degrees of momentum depending on circumstances in the society and the quality of the leadership provided within the Department of Education, changes continued until the county and district boards were established in 1969. Regional offices were established in the mid 1960s to improve the delivery of educational services by the Department of Education. Later, when the larger units were in operation, it became possible to delegate to these units a number of responsibilities formerly conducted by the Department. But the Regional Offices were still able to perform a useful and essential role by making available advice and resources of personnel to local boards. This is an important function in a decentralized educational system and one that cannot be adequately fulfilled from a remote distance by people who are unaware of local conditions and circumstances.

WE RECOMMEND,

(13) THAT THE MINISTRY OF EDUCATION REAFFIRM ITS COMMITMENT TO THE POLE OF ITS REGIONAL OFFICES IN THE PROVISION OF EDUCATIONAL SERVICES IN ALL PARTS OF THE PROVINCE SO THAT THEIR POTENTIAL FOR IMPROVEMENT IN EDUCATION WILL BE UNDERSTOOD AND ACCEPTED BY SCHOOL BOARDS, PROFESSIONAL PERSONNEL, INTERESTED ORGANIZATIONS, AND THE GENERAL PUBLIC,

The development of curriculum guidelines is an important function of the Ministry of Education. There is a need for some central determination in this area if there is to be continuity in programs from the junior kindergarten through Grade 13 and if duplication is to be avoided. Responsibility for the planning and development of guidelines should rest with the reconstituted Curriculum Branch. Assistance in this process should be secured from personnel in Regional Offices and from representatives of interested groups such as teachers, supervisory personnel, trustee organizations, Home and School groups, administrative officials, and faculties of education.

WE RECOMMEND,

(14) THAT THE CURRICULUM BRANCH OF THE MINISTRY OF EDUCATION BE RESPONSIBLE FOR THE DEVELOPMENT OF CURRICULUM GUIDELINES WITH PARTICIPATION OF PERSONNEL FROM THE REGIONAL OFFICES AND OF REPRESENTATIVES OF INTERESTED GROUPS,

The Ministry of Education continues to conduct a large number of summer courses for teachers. The planning and conduct of these courses occupies a considerable part of the time and effort of several senior officials of the Ministry. The facilities in which a substantial number of the summer courses are conducted have to be secured from other educational organizations, including universities. Staff are recruited from a variety of sources, including faculties of education in the universities.

The faculties of education in the universities have responsibility for the basic professional education of all secondary and most elementary school teachers. They already conduct summer courses for teachers in certain subject or speciality fields. Faculty members have a detailed knowledge of the most highly qualified personnel in the areas of their expertise. A sufficient number of staff of faculties of education are available to teach during the summer session.

It is, therefore, difficult to understand the continuing reluctance of

the Ministry of Education to surrender its involvement in an area where another agency, namely the faculties of education, possess the facilities and accommodation, the essential expertise of their professional staffs, the time, and the administrative organization to provide summer courses. The Ministry's present involvement in the conduct of summer courses for teachers is a good example of the unnecessary participation in activities which can be carried out by other more appropriate agencies. Transfer of responsibility for summer courses to faculties of education would save the time of Ministry personnel, would reduce the number of staff required, and would result in a more efficient and effective use of personnel in both the Ministry and the faculties of education.

WE RECOMMEND,

(15) THAT THE MINISTRY OF EDUCATION TRANSFER TO THE TEN FACULTIES OF EDUCATION RESPONSIBILITY FOR THE CONDUCT OF PROFESSIONAL SUMMER COURSES FOR EDUCATIONAL PERSONNEL.

There is a need for liaison between the Ministry of Education, as the certifying body for teachers, and the faculties of education, as the agencies responsible for the conduct of basic teacher education programs. The nature of that relationship is most important for the quality of teacher preparation. If the Ministry assumes that it must dictate the nature of the program and require adherence to its views by faculties of education, the result is likely to be a sameness from institution to institution and an absence of innovation and creativity in the development of new programs. Conformity and uniformity spawn sterility, lack of imagination, and mediocrity.

The Ministry's role in a liaison relationship with the faculties of education should be to encourage different patterns for the preparation of teachers, to facilitate experimentation and research, to urge consultation with school boards and other organizations interested in teacher preparation, and to be accountable for the quality of the professional competence of graduates when they are recommended for certification.

In this manner the Ministry will best be able to exercise its leadership function without the necessity to practise any form of inspection, overt or subtle.

WE RECOMMEND,

(16) THAT THE MINISTRY OF EDUCATION ADOPT A CONSISTENT LIAISON ROLE IN ITS RELATIONSHIPS WITH THE FACULTIES OF EDUCATION FOR ALL PROGRAMS OFFERED BY THE FACULTIES AND LEADING TO ANY TYPE OF CERTIFICATION BY THE MINISTRY OF EDUCATION.

The number of senior staff in the Teacher Education and Certification Branch of the Ministry of Education exceeds the complement at the time when the Ministry had direct responsibility for the conduct of thirteen Teachers' Colleges and the establishment of and liaison with the Colleges of Education. Even allowing for the transfer from another branch of some duties associated with the certification process, the need for the present complement is not substantiated. If the Ministry adopts the liaison role recommended for the Branch, the need for the numbers now employed is even less necessary or desirable.

WE RECOMMEND,

(17) THAT THE NUMBER OF STAFF OF THE TEACHER EDUCATION AND CERTIFICATION BRANCH OF THE MINISTRY OF EDUCATION BE REDUCED TO THE LEVEL CONSISTENT WITH ITS RESPONSIBILITY FOR THE LIAISON FUNCTION WITH THE FACULTIES OF EDUCATION.

During each of the fiscal years 1975-76 and 1976-77, a sum of \$1,023,000 was allocated by the Ministry of Education for Ontario Scholarships. To be eligible for an Ontario Scholarship the student must achieve an average of 80 per cent on a stated number of credits at the Grade 13 level. A successful candidate is granted a special certificate and is given a

financial award of \$100. In each of the last two years provision was made for 10,230 such awards.

The substantial financial investment to ensure that all Ontario Scholars receive the \$100 award was questioned in the Committee. While not wishing to recommend the abolition of the financial award entirely, the Committee suggested that alternative methods of providing recognition be investigated. It was felt that the program was not required in its present scope but that it should not be reduced where there was an essential need to be met and where no alternative existed.

WE RECOMMEND,

(18) THAT THE MINISTRY OF EDUCATION INVESTIGATE THE NECESSITY FOR THE PRESENT WIDESPREAD SCOPE OF THE FINANCIAL AWARD OF \$100 TO EACH OF APPROXIMATELY 10,000 ONTARIO SCHOLARS ANNUALLY, THAT PROVISION CONTINUE TO BE MADE WHERE FINANCIAL ASSISTANCE IS ESSENTIAL AND NO ALTERNATIVE EXISTS, THAT THE FINANCIAL AWARD BE CONSIDERED IN RELATION TO OTHER PROGRAMS OF STUDENT AWARDS, AND THAT SCHOLARLY ACHIEVEMENT CONTINUE TO BE RECOGNIZED THROUGH AWARD OF THE ONTARIO SCHOLAR CERTIFICATE.

The Ministry of Education provides correspondence courses for more than 50,000 persons. At the elementary level, about 500 students are in courses conducted in English while about 100 are French-speaking students taking courses in French. The result is that enrolment at any particular age level is quite small.

The great majority of students are enrolled in courses at the secondary school level. A large proportion of this group is from the Metropolitan Toronto area and other urban centres where programs are already available, either during the day or in the evening. If there were sufficient demand, classes could be provided at other times. The drop-out rate after initial enrolment is very high among correspondence course students. It is quite possible that many of the drop-outs would continue

their education if they were enrolled in regular classes taught at times when their work schedules would permit them to be present.

The Correspondence Courses Branch has for many years offered an educational opportunity for students who did not have access to any other form of instruction. With the increase and improvements in modes of transportation, with developments in electronics and communications media, with the establishment of composite secondary schools throughout the province and the availability of courses, the circumstances that justified the initial correspondence course program have changed almost completely. Local educational authorities have provided itinerant teachers for "shut-in" pupils and have initiated other programs designed to ensure educational opportunities for almost all children in their jurisdictions. It is considered that they have the capability and the expertise to provide for students now enrolled in correspondence courses.

The Correspondence Courses Branch has become a costly operation. The financial commitment in 1976-77 is estimated at more than \$4,100,000. If the Branch were discontinued, some of the annual allocation to the Branch would have to be made to school boards to assist them to provide the necessary alternative programs. There could be a substantial overall financial saving with the added advantage of direct classroom instruction.

WE RECOMMEND,

(19) THAT THE MINISTRY OF EDUCATION BEGIN, EFFECTIVE JUNE 30, 1977, TO REDUCE THE ORGANIZATIONAL AND ADMINISTRATIVE STRUCTURE OF ITS CORRESPONDENCE COURSES BRANCH TO THE POINT WHERE IT IS PROVIDING ONLY AN ESSENTIAL SERVICE THAT CANNOT BE MET BY ANY OTHER MEANS; THAT THE MINISTRY INVESTIGATE OTHER POSSIBLE ALTERNATIVES FOR MEETING ANY REMAINING ESSENTIAL NEED WITH THE ULTIMATE OBJECTIVE OF ELIMINATION OF THE BRANCH; THAT SCHOOL BOARDS CONTINUE TO OFFER COURSES OUTSIDE DAY-SCHOOL HOURS FOR THOSE WHO NEED THEM; THAT EXISTING SPECIAL PROVISIONS BY SCHOOL BOARDS BE CONTINUED AND, WHERE NECESSARY, EXTENDED TO ENSURE THAT ALL THOSE WHO WISH TO PURSUE THEIR EDUCATION MAY DO SO.

The Ministry of Education maintains a multiplicity of committees of various types. They consume a large proportion of the time and effort of senior officials and other personnel. There is no effective procedure for determining the length of time a committee will continue to exist nor are there provisions for the dissolution of committees when their purposes have been accomplished. Many of them serve no useful purpose and, indeed, a substantial number may be counter-productive in terms of good administration and sound decision-making.

WE RECOMMEND,

(20) THAT THE MINISTRY OF EDUCATION ESTABLISH A POLICY TO CONTROL THE NUMBER OF AD HOC COMMITTEES ESTABLISHED WITHIN THE MINISTRY; THAT WHEN A COMMITTEE IS APPOINTED A DATE BE SET FOR ITS TERMINATION AND THAT ONLY FOR COMPELLING REASONS SHOULD ANY EXTENSION OF ITS ORIGINAL TERM BE GRANTED; SO THAT SENIOR OFFICIALS WILL NOT SPEND A DISPROPORTIONATE AMOUNT OF THEIR TIME SERVING ON COMMITTEES, SOME OF WHICH ARE SELF-PERPETUATING AND NON-PRODUCTIVE; THAT THE MINISTRY UNDERTAKE A COMPLETE REVIEW OF THE NEED FOR EXISTING COMMITTEES, THAT IT DISSOLVE THOSE THAT ARE NO LONGER NECESSARY, AND THAT IT ADOPT REASONABLE ADMINISTRATIVE PROCEDURES TO AVOID THE UNNECESSARY PROLIFERATION OF COMMITTEES,

E. School Boards (Chapter 6)

School trustees and their school board should involve themselves in the development of educational goals and a philosophical direction for their school system. Traditionally, this function, if it has been performed at all, has been left to the central authority and the professional staff. Trustees and boards have too often chosen, or been led, to spend their time almost wholly on administrative matters or irrelevant minutiae involved in the operation of the schools. The result has been that substantive issues have by default been left to the administrative team or the teaching staff. In these days of demands by the public for accountability on the part of its elected representatives on school boards, it is no longer acceptable for school trustees to abdicate their responsibilities and as a result allow them to be assumed by appointed staff personnel.

There are some important distinctions to be made in the division of responsibilities between elected trustees and professional staff. The usual division is between policy and administration. But, in practice, the distinctions are not always clear cut and there are occasionally considerations that make strict adherence to these divisions difficult or impossible. Nonetheless, the division is useful as a general guide to the separation of functions. The determination of goals and direction for each school system is, however, definitely the prerogative of the school board within the broader goals established by the central authority. Where trustees feel inadequate or incompetent to make judgments about the goals of education in their jurisdictions, they have an obligation to inform themselves through concerted effort. Fortunately, trustees have substantial resources on which they can draw for information and advice. In addition, they have an obligation to consult with parents in the school system, representatives of interested community organizations, professional staff, and the general public.

It is important to recognize that once goals have been established, it is the responsibility of the professionals to develop programs as possible means for achieving the goals and to indicate their views about the priorities and the costs involved. But again the board must choose

the programs to be pursued. The implementation is a professional responsibility, including evaluation based on agreed-on and understood criteria. When the results are known, school trustees should participate in a re-examination of the goals and priorities for the purpose of determining possible or necessary modifications that should be made.

In summary, it is imperative that trustees as members of a school board play a significant role in the determination of the goals of the school system, that they involve other persons and groups in an advisory capacity in the process of decision-making, and that they accept responsibility for the effectiveness of the school system in relation to the agreed-on goals.

WE RECOMMEND,

(21) THAT TRUSTEES OF EACH SCHOOL BOARD INVOLVE THEMSELVES IN THE DEVELOPMENT AND DETERMINATION OF EDUCATIONAL GOALS AND A PHILOSOPHICAL DIRECTION FOR THEIR SCHOOL SYSTEM AND THAT, IN THE PROCESS, THEY NOT ONLY PERMIT BUT ALSO ACTIVELY SEEK THE PARTICIPATION OF PARENTS, REPRESENTATIVES OF INTERESTED COMMUNITY GROUPS AND ORGANIZATIONS, THE GENERAL PUBLIC, AND PROFESSIONAL STAFF.

In most school board jurisdictions, little interest is shown in the meetings, activities, and decisions of the boards unless a contentious issue arises. Once a matter in dispute is resolved, there is a reversion to disinterest and unconcern. Unfortunately, some school boards by their procedures encourage non-involvement of the public in educational decision-making. Others see any intervention or display of interest by the community as dissatisfaction with the boards' control. Some administrators operate the school system as a "closed" enterprise, denying to the public access to information and data in which they might be interested and to which they are entitled as citizens and taxpayers. It is little wonder that, denied any meaningful role in the conduct of the schools, the public show little or no interest in the

election of their representatives to the boards.

It is highly desirable that steps be taken to gain the participation of the public in the determination of the kind of education they wish to see in their school system and in the individual school. Only through an informed and interested public can it be expected that support for quality education will be realized. The difficulties of communication are many and real but these are capable of resolution given the desire and the will. In the light of the alternatives for public quality education, they must be overcome.

WE RECOMMEND,

(22) THAT EACH SCHOOL BOARD DEVELOP AND ADOPT A POLICY OF OPENNESS WITH ITS COMMUNITIES THROUGH PUBLICITY REGARDING ITS PROBLEMS, ACTIVITIES, CONCERNS, POSSIBLE SOLUTIONS TO DIFFICULTIES, FINANCIAL CONSTRAINTS, AND THE LIKE WITH A VIEW TO THE DEVELOPMENT OF AN INTERESTED, INFORMED, AND PARTICIPATING CONSTITUENCY,

The individual school or a "family" of schools acting in consort is the basic unit for curriculum development and for the delivery of educational services within a community. The principal of the school must assume responsibility for educational leadership within the area served by his school. That leadership involves, among other requirements, participation in community affairs, a detailed knowledge of the community and its educational and other expectations, an ability to work cooperatively with community organizations towards accepted goals, a professional competence recognized by colleagues and the public, a concern for children, and an enthusiasm for quality education for every child. This is a tall order to expect in any individual but it is consistent with the pivotal role of educational leadership which the position of principal must involve now and in the future.

If the principal is to fulfill the role outlined for him and if he is to provide the leadership that is envisaged, he and his staff must be given

the necessary authority and responsibility to perform their functions. School communities must be able to adapt freely curriculum guidelines issued by the central authority and modified by the school system to meet the particular needs of their school communities. Only through the granting of this responsibility can the principal and his staff be held accountable for the effectiveness of the programs they implement. Only through a high degree of autonomy can the schools accept responsibility for the quality of the educational program as judged by agreed-on evaluative criteria.

WE RECOMMEND,

(23) THAT EACH SCHOOL BOARD DELEGATE TO A SCHOOL, OR A FAMILY OF SCHOOLS, OR OTHER EDUCATIONAL UNIT AT THE COMMUNITY LEVEL, AS MUCH RESPONSIBILITY AS PRACTICABLE FOR THE EDUCATIONAL PROGRAM; THAT THE NECESSARY AUTHORITY CONSISTENT WITH THAT RESPONSIBILITY BE ALSO GRANTED; AND THAT EACH UNIT BE HELD ACCOUNTABLE FOR THE EFFECTIVENESS OF THE RESULTS OF ITS DELEGATED RESPONSIBILITIES THROUGH AGREED-ON EVALUATIVE CRITERIA.

During the last two decades there has been a tremendous increase in the number of positions of responsibility in schools, particularly at the secondary level but also in grades seven and eight of the senior schools and in the junior high schools. The impetus for this development came, at least in part, as a result of a shortage of qualified teachers. Some rapidly-expanding school systems offered status titles and additional salary to attract successful teachers away from their classroom duties with other systems, where, because of a more static enrolment, opportunities for advancement were more limited. This trend resulted in a highly mobile teaching staff until well into the 1970s. Now, because of a deceleration in the rate of growth of enrolment or an actual or impending decrease in enrolment, the teaching body tends to remain with the boards by which they are employed.

At the present time, there are a multiplicity of titles by which positions of responsibility are designated. These include principal, vice-principal, division head, department head, department head (major), department head (minor), associate head, assistant head, subject head, dean, assistant dean, chairman, major chairman, minor chairman, master teacher, senior teacher, director. Each of these titles usually carries with it additional remuneration above the salary grid. Some of the provisions relating to the number of positions and the allowances for them are incorporated in the negotiated agreements between teachers and boards.

The organizational structure of some schools indicates that the number of positions of responsibility has reached ridiculous proportions. Far from providing for a more efficient and more effective conduct of a school's business, the great number of staff carrying some additional title can only lead to lack of clarity of function, over-direction, and confusion. The system has the best chance to avoid these difficulties when the incumbents recognize the situation for what it is - a means of paying additional salary with no corresponding duties - and act accordingly.

Certainly there is a need for some personnel with supervisory responsibilities in each school. But the number should be reduced to an absolute minimum. As specific job description should be developed for each position of responsibility established and criteria, by which performance in the position can be evaluated, should be clearly stated.

WE RECOMMEND,

(24) THAT EACH SCHOOL BOARD REVIEW THE ORGANIZATIONAL STRUCTURE OF ITS SCHOOLS TO ENSURE THAT THERE IS NO OVERSTAFFING; AND THAT THERE IS NO EXCESS IN THE NUMBER OF DESIGNATED POSITIONS OF RESPONSIBILITY WITH SUPPLEMENTARY FINANCIAL ALLOWANCES,

The number and diversity of educational conferences for teachers and other professional personnel have increased greatly in recent years. Undoubtedly attendance at some of these meetings is of value to staff members and as a result has a positive impact on the educational experiences of children in the classrooms. Participation in others is of little benefit to either teachers or pupils. In either case, it must be recognized that financial payments are involved and that in many instances the amounts are substantial. Not only are there expenditures for registration fees and for travel and living allowances but there are also the costs associated with the provision of a supply teacher to fill in during the regular teacher's absence. All too often the continuity of the regular teacher's work with his students is interrupted and the time virtually lost because of the understandable inability of the supply teacher to pick up the threads of the day to day work.

School boards should have stated policies dealing with the absence of any personnel from their regular duties. The number and frequency of these absences should be held to a minimum. Any request for attendance at conferences during class time should be accompanied by a justification for the absence based on the ultimate value that will accrue to students. Boards should establish priorities that have regard for the most productive use of scarce financial resources.

WE RECOMMEND,

(25) THAT SCHOOL BOARDS REVIEW THEIR PRESENT PRACTICES REGARDING ATTENDANCE OF STAFF AT CONFERENCES OUTSIDE THEIR SCHOOL SYSTEMS FOR WHICH SUPPLY TEACHERS AND TRAVEL AND LIVING EXPENSES ARE PAID BY THE BOARDS; AND THAT BOARDS DEVELOP POLICIES TO ENSURE THAT EXPENDITURES FOR THIS PURPOSE ARE JUSTIFIED IN TERMS OF AMOUNT AND POSITIVE BENEFITS TO THE SCHOOL SYSTEMS AND TO STUDENTS,

The Education Act, 1974, continued a provision whereby school boards could make payment of gratuities to employees at retirement or termination of employment for accumulated sick leave credits. In effect, these payments do not provide insurance for employees against illness but instead provide a bonus for remaining healthy. No provision exists for the funding of these payments during the period when the liability is being created. When the payment must ultimately be made, the whole burden falls on the taxpayer and must be financed from current revenues. This results in substantial fluctuations in the amounts to be raised from year to year. The long-term financial implications are serious for school boards.

An alternative form of protection against loss of salary is long-term disability insurance. This type of insurance has been adopted in many organizations, including a substantial number in the public service sector. Usually, in any changeover of this type provision is made for the protection of credits of employees earned up to the time of introduction of the new plan.

WE RECOMMEND,

(26) THAT SCHOOL BOARDS ADOPT A POLICY WHEREBY LONG-TERM DISABILITY INSURANCE WILL REPLACE SICK LEAVE CREDITS RESULTING IN GRATUITY ALLOWANCE PAYMENTS FOR UNUSED CREDITS AT RETIREMENT OR TERMINATION OF EMPLOYMENT; AND THAT PROVISION BE MADE FOR SUITABLE ADJUSTMENT FOR CREDITS EARNED BY EMPLOYEES PRIOR TO THE IMPLEMENTATION OF THE NEW POLICY.

On January 1, 1969, county and district school boards were established. They represented consolidation of a large number of former boards, many of which had themselves been established through consolidation of school sections into township school areas, or by the union of municipalities into high school districts. The county and district boards have been in existence for eight full years. It is now possible to make comparisons between the relative effectiveness of these units

when compared with other larger boards that were not affected by the reorganization. It is also important to know how the new units have developed in the time they have been in existence and to identify the best that has been achieved by all boards. It is time that an in-depth study was commissioned to examine all aspects of the functioning of the new boards and to suggest possible alternative courses of action for the years ahead.

It is suggested that the terms of reference of an extensive and comprehensive research study into the operation of school boards be developed in consultation with boards, trustees, and trustee organizations. The study should be conducted by competent and experienced researchers and should be funded by the Ministry of Education as a contribution to the attainment of quality education in Ontario.

WE RECOMMEND,

(27) THAT, SINCE COUNTY AND DISTRICT SCHOOL BOARDS HAVE BEEN IN OPERATION FOR EIGHT FULL YEARS, SCHOOL TRUSTEES, BOARDS, AND TRUSTEE ORGANIZATIONS SHOULD DEVELOP TERMS OF REFERENCE FOR AN IN-DEPTH STUDY OF EVERY ASPECT OF SCHOOL BOARD OPERATIONS; THAT A WELL-DESIGNED RESEARCH PROJECT SHOULD BE CONDUCTED BY COMPETENT AND EXPERIENCED RESEARCHERS; AND THAT THE MINISTRY OF EDUCATION SHOULD PROVIDE FINANCIAL RESOURCES FOR THE PROJECT AS A CONTRIBUTION TO THE ATTAINMENT OF QUALITY EDUCATION IN ONTARIO,

F. Metropolitan Toronto School Board (Chapter 7)

The circumstances that resulted in the creation of the Municipality of Metropolitan Toronto in 1954 were related to the provision of municipal services such as roads, transportation, water, sewers, and police protection and to the financing of these services. The problem in the provision of the single service of education lay almost wholly in the limited ability of Etobicoke, North York and Scarborough to meet the financial obligations associated with development of hundreds of new subdivisions in the open areas of these municipalities and the provision of new school buildings to accommodate thousands of students from the new homes. The solution for both municipal services and educational services was to create a Metropolitan form of government with a two-tier organizational structure. Subsequent amendments to the original format maintained the relationship between the provision for the administration of municipal services and the administration of education.

The circumstances that may have justified the formation of the Metropolitan Toronto School Board in 1954 had changed almost completely by 1976. For example, almost all the land in the three largest municipalities has been built on so that the need for essential new school accommodation has largely been met. In any case, the rate and amount of legislative grants provided by the province for new schools have been increased to a much higher level than prevailed in 1953. Where funds are required for essential accommodation, they can be provided through the Ontario Education Capital Aid Corporation at relatively favourable interest rates.

It is our view that the Metropolitan Toronto School Board has served its purpose and that it is now an unnecessary organizational structure. Any essential functions that it performs could be assumed by the six local area boards. Abolition of the Metropolitan Toronto School Board would eliminate a level of bureaucracy with resulting savings in time of area board officials and trustees. Substantial economies would result from elimination of the high salaries of senior personnel and other administrative costs. It would restore to area boards authority and responsibility for the operation of their schools and would in the process make all trustees accountable, in fact, for the decisions that are now in reality

made elsewhere by a small number of representatives of trustees at the Metropolitan Toronto School Board level.

The requirements of governmental structure for the delivery of a multiplicity of municipal services are quite different from the needs for the provision of the single service of education. Consequently, even though the Metropolitan two-tier system of governance may still be necessary in the municipal field, it does not follow that it serves any essential role in the delivery of educational services. It is our view that the continued existence of the Metropolitan Toronto School Board is unnecessary and, indeed, that it is impinging on the authority and responsibility of the six area boards and their trustees to deliver good educational services to their constituencies. When to these negatives is added the fact that the organizational structure is an invitation to extravagance, there is ample evidence to justify its abolition.

WE RECOMMEND,

(28) THAT, EFFECTIVE DECEMBER 31, 1977, OR AS SOON AS POSSIBLE THEREAFTER, THE METROPOLITAN TORONTO SCHOOL BOARD BE ABOLISHED AND THAT ANY NECESSARY FUNCTIONS IT PERFORMS BE ASSIGNED TO THE AREA BOARDS IN THE METROPOLITAN AREA.

G. School Year (Chapter 8)

For many decades in Ontario, the authority for determination of the number and distribution of school days throughout the school year was contained in the statutes. The discontinuance of the Grade 13 external examinations in 1968 eliminated the necessity for the secondary schools to terminate their regular instructional program at the end of May. It also meant that any justification for the release from duty of many secondary school teachers for part or all of the month of June disappeared. Elementary school teachers who had always continued their programs to the end of June could no longer see any reason for a difference in the number of instructional days between the elementary and secondary schools. The Department of Education had difficulties in its attempts to resolve the problem.

In 1972, the Minister of Education appointed a Task Force to study the problem and to make recommendations for its possible solution. Subsequently, the direct statutory authority for determining the school year and school holidays was repealed and the Minister of Education given power, subject to approval of the Lieutenant Governor in Council, to make regulations governing these matters. One result has been that school boards have been given responsibility for determining the number of school days in excess of 185 that will be devoted to professional activity days. Ostensibly, the justification for this transfer of responsibility was the desire to provide a greater degree of freedom to school boards. In practice, the problem confronting the Ministry of Education was solved for it by making it a problem for school boards instead. There were a number of other negative developments resulting from the transfer of some superficial responsibility for determining the dates and numbers of days to be devoted to instruction.

The major problem has been the number of days in excess of 185 to be devoted to professional activities. Depending on the calendar, the total number of school days varies from 194 to 197. Consequently, the maximum number of days in any school year, which may be devoted to professional activities, varies from nine to twelve. It is the determination of the number to be provided that has absorbed an inordinate amount of

the time of school boards and that has led to confusion and controversy. Usually, teachers at the secondary level have wished to have the maximum number possible allocated for professional activities and elementary school teachers have been unprepared to accept any fewer days. Parents have usually been opposed to the number granted. The financial cost is substantial and there has been little objective evidence to show that there is adequate return in terms of improvement of the educational program. While it may be politically advantageous to the provincial government to be removed from the necessity to make decisions in this area, that advantage must be measured against the impact on education and the schools at the local level.

While we are generally in agreement with the principle that school boards should have the maximum possible degree of freedom, there are certain matters which should continue to be the responsibility of the Ministry of Education. The designation of the school year is in the latter category. If the Minister of Education does not wish to accept this responsibility, it could be made a direct statutory authority again.

WE RECOMMEND,

(29) THAT THE REGULATION GOVERNING THE SCHOOL YEAR AND SCHOOL HOLIDAYS BE AMENDED TO PLACE FULL AUTHORITY FOR THE DETERMINATION OF THESE MATTERS, INCLUDING THE DATES FOR THE MID-TERM BREAK, WITH THE MINISTER OF EDUCATION, SUBJECT TO APPROVAL BY THE LIEUTENANT GOVERNOR IN COUNCIL;

It is our view that the possible allocation of from nine to twelve days to professional activities is excessive and, in the absence of any objective evidence to the contrary, may even be counter-productive in terms of improvement in the educational program. We do, however, recognize the need of some provision for professional staff to have time for undertaking programs designed to enhance their knowledge and skills. The determination of the number of days for this purpose should be established by the Ministry of Education.

WE RECOMMEND,

(30) THAT THE NUMBER OF INSTRUCTIONAL DAYS PER SCHOOL YEAR BE NOT LESS THAN 190, AND THAT THE REMAINING NUMBER OF SCHOOL DAYS, DEPENDING ON THE CALENDAR, BE AVAILABLE AT THE DISCRETION OF THE SCHOOL BOARD FOR ACTIVITIES DESIGNED TO IMPROVE PROFESSIONAL COMPETENCE;

Under existing provisions, the total number of days in the school year varies from 194 to 197, depending on the calendar. As already pointed out, these numbers may be reduced to 185 instructional days, with the difference devoted to professional development for teachers. But there are a number of other activities, particularly in the secondary schools, that reduce still further the opportunities for students to have new experiences of a worthwhile educational nature. An example is in the area of evaluation of pupil progress. It is imperative that both teachers and students be aware of the educational goals of the program and that there be established criteria by which the degree of progress towards the goals can be determined. To the maximum extent possible, this information should be available promptly so that, where necessary, corrective action can be taken to overcome deficiencies that may have been revealed. Otherwise, at least in some content areas, the difficulties may become cumulative to the point where little can be done to improve the situation. Consequently, evaluation should be an on-going process forming a regular part of the day-to-day program.

A set of formal examinations may form a useful part of the total evaluation process, particularly if the information revealed forms the basis for necessary adjustments and adaptations of the teaching program to meet the needs of students. Over-reliance on or exclusive use of sets of formal examinations in evaluation of student progress may reduce the time available for new learning experiences. For example, if a school conducts three sets of formal examinations during a school year, each set requiring as many as seven instructional days, the number of teaching days, under existing provisions, may be reduced to as low as 164.

The allocation of time and the commitment of resources of personnel and finances in this manner must be measured against the educational gains that might be achieved if a good part of the twenty-one days were devoted to new experiences and new learnings. The major consideration in this example is the most effective use of time.

Similar comments might be made about the conduct and administration of other activities. For example, there is no doubt of the educational value of field trips, if they are an integral part of the program and if they are well planned and conducted. The potential for positive learnings outside the school setting is substantial and is being realized to a greater extent than ever before. But, again, it is a matter of balance and the best use of time and resources. It is the excesses that are open to criticism and it is to these areas that closer attention should be directed by school boards, administrators, supervisors and teachers if the wise use of scarce resources is to be achieved.

WE RECOMMEND,

(31) THAT EACH SECONDARY SCHOOL GIVE PARTICULAR ATTENTION TO THE BEST USE OF THE TOTAL NUMBER OF INSTRUCTIONAL DAYS AVAILABLE TO ENSURE THAT THE COMMITMENT OF SCARCE RESOURCES OF PERSONNEL AND MONEY IS PROVIDING THE MAXIMUM POSSIBLE RETURN IN EDUCATIONAL OPPORTUNITIES FOR STUDENTS.

H. Salaries and Other Allowances to School Board Members (Chapter 9)

From the earliest years of the Ontario educational system until 1950, school trustees served without salary. It was as recent as 1941 that legislation was passed permitting payment of a mileage allowance for trustees of township school areas. Since these dates there have been numerous adjustments in the amounts of expenses and salary permitted by legislation.

At the present time, the maximum levels for honoraria for trustees are established by legislation and are set out in The Education Act. Most boards have endorsed payment at the maximum levels permitted by legislation. The justification for this decision is that the Legislature endorsed these amounts. The trustees and the boards are in practice relieved of most of the responsibility for the determination of the honoraria they receive.

Municipal councils must accept full responsibility for the honoraria they pay to their members. Given the controls that we propose, we believe that school boards should be made fully responsible and accountable to the electors for the honoraria they receive and that for these purposes they should be considered similar to municipal councils.

WE RECOMMEND,

(32) THAT SECTION 164, SUBSECTIONS (1) AND (2) OF THE EDUCATION ACT THAT ESTABLISH THE MAXIMA AMOUNTS OF HONORARIA FOR SCHOOL TRUSTEES BE REPEALED SO THAT THE SETTING OF THE AMOUNTS OF HONORARIA WILL BE OPEN TO CLOSER PUBLIC SCRUTINY AND SO THAT TRUSTEES WILL HAVE TO ACCEPT RESPONSIBILITY FOR THE AMOUNTS OF THE HONORARIA GRANTED.

A board may at any time during the period for which it was elected increase the honoraria to its trustees to the maxima permitted by the legislation. In addition, it can declare a proportion of the

honoraria non-taxable up to the statutory limit within the provisions of The Income Tax Act. It may also at any time provide a mileage allowance for attendance of trustees at meetings of the board at a rate to be determined by the board. There have been cases where boards have increased these allowances immediately following their election to office.

It is our view that electors should know at the time of the municipal election the allowances that trustees will receive for the term of office for which the election is being held. To achieve this objective all allowances should be determined by the board at its first meeting in October preceding the election with effect from the following January 1 and that, once determined, these allowances should not be increased during the term of office. It would thus be possible for the public to hold trustees accountable for the amount of their allowances and for prospective candidates to know the level of remuneration they could expect to receive if elected.

WE RECOMMEND,

(33) (A) THAT ANY INCREASES IN THE SALARY FOR SCHOOL TRUSTEES, IN THE PROPORTION OF THE SALARY NOT SUBJECT TO TAX WITHIN THE PROVISIONS OF THE INCOME TAX ACT, IN THE MILEAGE ALLOWANCE RATES, AND IN ANY OTHER ALLOWANCES OF A SIMILAR NATURE SHOULD BE MADE BY A RECORDED VOTE OF ALL TRUSTEES OF THE BOARD AT ITS FIRST MEETING IN THE MONTH OF OCTOBER PRECEDING THE ELECTION FOR THE SCHOOL BOARD FOR THE NEXT TERM;

(B) THAT THE ALLOWANCES ESTABLISHED BY THE PROCEDURE IN (A) BE EFFECTIVE FROM JANUARY 1 OF THE TERM OF OFFICE FOR WHICH THE BOARD IS ELECTED AND THAT THEY NOT BE SUBJECT TO ANY INCREASE DURING THE TERM OF OFFICE OF THE TRUSTEES.

Payments of honoraria to trustees are at present eligible for inclusion in recognized ordinary expenditures on which grant is paid by the province up to the maximum per pupil eligible for grant. Because trustees should be responsible to the electors for the performance of their

duties on behalf of the electorate and because they should be accountable to the electorate for the expenditures they approve, we believe that the honoraria for trustees should be paid out of local taxation.

WE RECOMMEND,

(34) THAT THE AMOUNT OF THE HONORARIA FOR TRUSTEES BE INELIGIBLE FOR INCLUSION IN RECOGNIZED ORDINARY EXPENDITURES FOR LEGISLATIVE GRANT PURPOSES,

I. Private Schools (Chapter 10)

Provision exists in legislation for the establishment and operation of private schools in Ontario at both the elementary and secondary school levels.

The enrolment trends in private schools in the years 1967 to 1974 inclusive reveal that there has been a slight annual increase during most years of the period. At the elementary level, a good part of the increase has been in the junior kindergarten and kindergarten classes. In the secondary panel, the net increase during the eight-year period was 1,607 students. Given the overall increase in the province in the number of students at the secondary level, the proportion in private secondary schools has remained almost static. For comparison purposes, the total private school enrolment in 1974 of 51,440 is approximately 2.5 per cent of the enrolment of 1,994,489 in the public educational system in the same year.

The major justification for the existence of private schools is that they provide a clear alternative to the schools of the public system. Many of the private schools at the secondary level in Ontario, however, adopt the curriculum guidelines issued by the Ministry of Education, request inspection by representatives of the Ministry, and profess to meet the specific requirements of the Ministry for the Secondary School Graduation Diploma, the Secondary School Honour Graduation Diploma, and the Ontario Scholarship program. The main reason for this voluntary adherence to the specifications of the Ministry of Education seems to be to enable the private schools to advertise this fact in an endeavour to convince parents of prospective students that their programs are academically acceptable. The hope is that, as a result, the private schools will attract a larger enrolment. In the process, however, the private schools sacrifice much of the justification for their existence as unique, different, alternative educational institutions.

WE RECOMMEND,

(35) THAT THE MINISTRY OF EDUCATION ENCOURAGE PRIVATE SCHOOLS TO DEVELOP THEIR OWN CRITERIA FOR GRADUATION OF THEIR STUDENTS INSTEAD OF USING THE SECONDARY SCHOOL GRADUATION DIPLOMA AND THE SECONDARY SCHOOL HONOUR GRADUATION DIPLOMA TO CONVINCE PARENTS AND PROSPECTIVE STUDENTS OF THE ACCEPTABILITY OF THEIR PROGRAMS;

The Ministry of Education at the request of a private school will provide inspection services for a nominal fee. It is almost inevitable that representatives of the Ministry will assess the private school in terms of the criteria that they would apply to schools in the public system. There is then a strong influence toward conformity to and uniformity with the public system. Again, this works against attainment of the major purpose that justifies the private school as an acceptable alternative form of education.

The Ministry of Education accepts requests from private schools with offices in Ontario for inspection of their schools situated in Switzerland and the Caribbean. There are a number of questions that arise as a result of the Ministry's involvement in this activity. The use of the legal authority under The Education Act, applicable to Ontario, to inspect private schools in other countries is highly questionable. The right to assign employees of the Ministry of Education and to pay their salaries and expenses to permit inspection of schools in jurisdictions outside of Ontario and Canada is not clearly established. The granting of the Secondary School Graduation Diploma and the Secondary School Honour Graduation Diploma to students who are not enrolled in schools in Ontario and at least some of whom have never resided in Ontario seems to go beyond the intent of the legislation and Regulations. The right to award the certificate as an Ontario Scholar to these students is similarly questionable. There is little doubt that the payment of the Ontario Scholarship financial award of \$100 to students who attend private schools in foreign jurisdictions is, if not illegal, at least generous beyond reason or justification.

WE RECOMMEND,

(36) THAT THE MINISTRY OF EDUCATION DISCONTINUE THE INSPECTION OF PRIVATE SCHOOLS ON REQUEST OF PRIVATE SCHOOLS, INCLUDING THOSE SCHOOLS IN SWITZERLAND AND THE CARIBBEAN;

The province provides financial support for The University of Toronto Schools, an integral part of the Faculty of Education in the University of Toronto. The original justification for its establishment as an institution to provide practice teaching for teachers-in-training is no longer valid, since there are now numerous schools in the public system available for this purpose. The University of Toronto Schools has become a private school subsidized with public funds. It is, therefore, a contradiction of the province's policy that public funds must not go to the support of private schools. In addition, the grant of more than \$500,000 in 1976-77 is a subsidy which is unfair to other private schools in their attempts to attract students and to parents of students who attend other private schools where the full cost of tuition must be borne without subsidy from the province.

WE RECOMMEND,

(37) THAT THE PROVINCE DISCONTINUE GRANTS TO THE UNIVERSITY OF TORONTO SCHOOLS SINCE SUCH ACTION IS INCONSISTENT WITH THE GOVERNMENT'S POLICY OF NON-FINANCIAL SUPPORT TO PRIVATE SCHOOLS, SINCE THERE IS NO VALID JUSTIFICATION FOR ANY EXCEPTIONAL STATUS FOR THE UNIVERSITY OF TORONTO SCHOOLS, AND SINCE GRANT SUPPORT IS FINANCIALLY DISCRIMINATORY AGAINST OTHER PRIVATE SCHOOLS AND THE PARENTS OF STUDENTS ATTENDING THEM.

J. Grade 13 (Chapter 11)

The final year of the secondary school program in Ontario is Grade 13. A student may graduate at the end of the Grade 12 year on successful completion of the number of credits required for the Secondary School Graduation Diploma. If the student continues into Grade 13 and completes successfully the additional credits required at that level, he or she receives the Secondary School Honour Graduation Diploma. Grade 13 has been a part of the educational program in Ontario for a century. Some of the historical reasons that justified its original inclusion in the secondary school system, while still relevant, may not apply with equal force today. Others are still applicable while adaptations, which have taken place to meet new circumstances, have made the final year a rich educational experience for many students.

During recent years there have been questions raised about the necessity for the Grade 13 year. Criticism has focused on the educational and financial aspects of the program. The conclusion of some of the critics has been that Grade 13 should be abolished. All too often this opinion has been reached without a thorough examination of all the relevant factors, without regard for the available evidence, and without consideration of the consequences of such a decision or the manner in which it might be implemented. This simplistic approach is characteristic of the manner in which too many decisions are reached in education to-day. What is required is a rational examination of this complex issue which would take into account all the relevant factors and which would provide an informed and objective assessment of the place of Grade 13 in the total educational and societal context.

We did not attempt to conduct a definitive study of Grade 13. Consequently, we have not recommended its abolition or continuance. But we have identified some of the criticisms that have been offered and some of the counter-arguments that have been presented on the educational side. From the financial standpoint there are no obvious advantages to be gained by elimination of Grade 13. Indeed, there is a real possibility that costs could be greater if it became necessary to provide some alternative educational program at the post-secondary level. We are

convinced that any decision to discontinue Grade 13 without a full knowledge of the ramifications of such action and without a well-thought-out and fully-developed plan to meet them would result in chaos and would be a disservice of substantial proportions for the educational system as a whole.

WE RECOMMEND,

(38) THAT ANY PROPOSAL FOR THE FUTURE OF GRADE 13 BE CONSIDERED IN THE LIGHT OF THE EVIDENCE DERIVED FROM A THOROUGH, OBJECTIVE, RATIONAL ASSESSMENT OF ALL THE RELEVANT FACTORS AS THEY APPLY IN THE SOCIETAL AND EDUCATIONAL CONTEXT IN ONTARIO.

CHAPTER 2

TEACHERS' SUPERANNUATION FUND

The Teachers' Superannuation Fund began receiving contributions on April 1, 1917. The Fund is administered by the Teachers' Superannuation Commission in accordance with the provisions of The Teachers' Superannuation Act. The Commission issues an annual Report to Contributors for its fiscal year, which has been from November 1 to October 31, but which will in the future coincide with the calendar year. In addition, it publishes periodically a Synopsis of the Teachers' Superannuation Act and Regulation, the most recent of which was for 1975. Every three years a Report of the Actuary is made to the Commission and this is released to the public. The last was the seventeenth which set out the condition of the Fund as at December 31, 1972. Changes in the Act are through amendments by the Legislature to The Teachers' Superannuation Act. Changes in the Regulation are made by the Provincial Cabinet by authority contained in the Act. For details about the Fund, its benefits, its financial position, and its administration, the publications referred to above should be consulted. These documents have been used extensively in the preparation of this report and most of the data and some of the commentary are quoted from them without specific acknowledgment.

The Teachers' Superannuation Commission

The fund is administered by the Teachers' Superannuation Commission which is composed of:

- (a) six persons appointed by the Minister of Education; and
- (b) five contributors to the Fund, each elected by ballot by the contributors to the Fund who are members of one of the affiliates of the Ontario Teachers' Federation.

At the time of preparation of this report the following persons were members of the Commission:

(a) Appointed by the Minister of Education:

- (i) Mr. J. R. Thomson (Chairman),
Teachers' Superannuation Commission;
- (ii) Mr. H. A. Blanchard, Member,
Teachers' Superannuation Commission;

- (iii) Mr. W. G. Chatterton, Director,
Legislation Branch, Ministry of Education;
 - (iv) Mr. J. F. Kinlin, Assistant Deputy Minister,
Ministry of Education;
 - (v) Mrs. Jean M. McConnell,
Superintendent of Supervisory Services,
Central Ontario Region,
Ministry of Education;
 - (vi) Mr. P. W. Ferren, Director of Education,
Timmins Board of Education.
- (b) Elected by teacher organizations:
- (i) Mrs. Mabel Stamp, Federation of
Women Teachers' Associations of Ontario;
 - (ii) Mrs. Evelynne Bertrand, L'Association
des Enseignants franco-ontariens;
 - (iii) Mrs. Marie Arthurs, Ontario
English Catholic Teachers' Association;
 - (iv) Mr. R. E. Poste, Ontario
Public School Men Teachers' Federation;
 - (v) Mr. D. W. Scott, Ontario
Secondary School Teachers' Federation:

Membership in the Fund

A person who holds a valid Ontario teaching certificate, who is employed by a school board, and who is not a contributor to any other pension fund to which public money is contributed, must be a contributor to the Fund. In addition, persons with a valid Ontario teaching certificate who are in the employ of designated private schools and a number of other educational bodies and organizations must contribute. Still others qualified as teachers are under certain conditions eligible to pay into the Fund.

Rate of Contribution

When the Fund was established on April 1, 1917, the rate of teacher contribution was $2\frac{1}{2}$ per cent of salary. The provincial government contributed an equal amount. The rate of contribution of each of the teacher and government increased periodically over the years, as shown in Table 1. By January 1, 1956, the rate of contribution of each of the teacher and government reached six per cent of salary. It remained at that level until

TABLE 1
TEACHERS' SUPERANNUATION FUND
PERCENTAGE RATE OF TEACHER'S SALARY CONTRIBUTED TO FUND
BY EACH OF TEACHER AND GOVERNMENT
1917 to 1976^a

| <u>Year</u> | <u>Teacher Contribution</u> | <u>Government Contribution</u> |
|-------------|---------------------------------|------------------------------------|
| 1917-36 | 2½% | 2½% |
| 1936-37 | 3 | 2½ |
| 1940-41 | 3½ | 2½ |
| 1943-44 | 3½ | 3½ |
| 1945-46 | 4 | 4 |
| 1949-50 | 6 | 4 |
| 1956-57 | 6 | 6 |
| 1966-67 | 6 ^b | 6 ^b |
| 1975-76 | 6 ^c | 6 ^c |

Note: ^a In 1917, the year was from April 1, 1917, to March 31, 1918. In 1918, the period was from April 1, 1918, to June 30, 1918. From July 1, 1918, to the end of 1952-53, contributions were received on a school-year basis. In 1953, there was a four-month report for the period September to December inclusive. From 1954, the reports have been on a calendar year basis. Ten months (or 200 days of occasional teaching) constitute a full year of service.

Note: ^b Includes contribution paid to Canada Pension Plan.

Note: ^c Does not include contribution of 1 per cent by teacher and matching contribution of 1 per cent by government to Superannuation Adjustment Fund, effective September 1, 1975.

Source: Synopsis of The Teachers' Superannuation Act and Regulation for 1975, Teachers' Superannuation Commission, Toronto, 1976, p.9.

December 31, 1965.

The Canada Pension Plan, which was introduced on January 1, 1966, was on that date integrated with the plan provided by the Teachers' Superannuation Fund. This means that, while the rate of contribution on the part of each of the teacher and province remained at a total of 6 per cent of salary, part of the amount calculated is paid to each of the Teachers' Superannuation Fund and the Canada Pension Plan.

An example of the distribution of the contribution between the two funds in 1975 on a teacher salary of \$15,000 is given in Table 2. The teacher and the government each paid to the Fund six per cent on the first \$700 of the teacher's salary; 4.2 per cent on the amount of the salary between \$700 and \$7,400 (maximum \$6,700); and six per cent on the amount over \$7,400. On the amount of the salary between \$700 and \$7,400 (maximum \$6,700), the teacher and the employing board each paid 1.8 per cent to the Canada Pension Plan.

Number of Pensioners by Type of Pension

There are eight different types of pension provided by the Fund. One of five of these types is available to the contributor who qualifies. Two are provided for dependants of former contributors. One (formerly Class "J") is a special arrangement. The numbers of recipients of each type of pension for the years 1972, 1973, and 1974, and the percentage increase in the number of each type for 1973 and 1974, are shown in Table 3. The total numbers of pensioners and the per cent increase for the period 1963 to 1974 inclusive are shown in Table 4.

Assets and Liabilities

At the time of the Report of the Actuary as at December 31, 1972, the Valuation Balance Sheet showed the assets and liabilities of the Fund as set out in Table 5. The statement of assets and liabilities for each of the fiscal years 1973 and 1974 is given in Table 6. Most of the assets of the Fund are in investments at par value in Province of Ontario bonds, having interest rates and maturity dates as set out in Table 7.

TABLE 2

CALCULATION OF CONTRIBUTIONS TO
TEACHERS' SUPERANNUATION FUND AND

CANADA PENSION PLAN, 1975

ON SALARY OF \$15,000

| | Teachers' Superannuation Fund | | Canada Pension Plan | | | Total To Both Plans |
|--|-------------------------------|--|---------------------------|---------------------------------|----|------------------------------|
| | Teacher's Contribution | Provincial Government Contribution | Teacher's Contribution | School Board Contribution | | |
| First \$700 of Salary | | | | | | |
| $\frac{6}{100} \times \frac{\$700}{1} =$ | \$ 42.00 | \$ 42.00 | \$ - - - | \$ - - - | \$ | 84.00 |
| Next \$6,700 of Salary | | | | | | |
| (a) $\frac{4.2}{100} \times \frac{\$6,700}{1} =$ | 281.40 | 281.40 | - - - | - - - | | 562.80 |
| (b) $\frac{1.8}{100} \times \frac{\$6,700}{1} =$ | - - - | - - - | 120.60 | 120.60 | | 241.20 |
| Balance of Salary | | | | | | |
| $\frac{6}{100} \times \frac{\$7,600}{1} =$ | 456.00 | 456.00 | - - - | - - - | | 912.00 |
| Total | \$779.40 | \$779.40 | \$120.60 | \$120.60 | | \$1,800.00 |

TABLE 3

CHANGES IN THE PENSION REGISTER

| | <u>1972, 1973, 1974</u> | | | |
|--|-----------------------------|-----------------------------|-----------------------------|--|
| | <u>Number on Pension</u> | | | |
| <u>Type of Pension</u> | <u>October 31, 1974</u> | <u>October 31, 1973</u> | <u>October 31, 1972</u> | <u>Percent Increase or (Decrease) 1974 over 1973</u> |
| Class "A" (age plus service equals 90) | 7,595 | 7,095 | 6,236 | 13.77 |
| Class "B" (30 years service commencing at age 55 at the earliest) | 2,140 | 2,174 | 2,219 | (2.03) |
| Class "F" (10 years service commencing at age 55 at the earliest) | 3,855 | 3,461 | 3,002 | 15.29 |
| Class "C" (total disability) | 689 | 666 | 621 | 7.25 |
| Class "CB" (disability as a teacher) | 613 | 594 | 566 | 4.95 |
| Class "D" (dependant's pension) | 1,295 | 1,182 | 1,067 | 10.78 |
| Class "E" (dependant of contributor who died before April 1, 1949) | 64 | 68 | 74 | (8.11) |
| Class "J" ^a | 6 | 6 | 7 | (14.29) |
| | <u>16,257</u> | <u>15,246</u> | <u>13,792</u> | <u>6.63</u> |
| | | | | <u>10.54</u> |

Note: ^aClass "J" pension is one where the teacher has elected to receive a reduced pension which, when he dies, is payable in half the amount to a named dependant.

Source: Report to Contributors for the Year Ended October 31, 1973, Teachers' Superannuation Commission, Toronto, 1974, p.4, and Report to Contributors for The Year Ended October 31, 1974, 1975, p.6.

TABLE 4
NUMBER OF PENSIONERS
1963 - 1974 inclusive

| <u>For the Year</u> <u>Ended October 31</u> | <u>Number of</u> <u>Pensioners</u> | <u>Percent</u> <u>Increase</u> |
|--|---------------------------------------|-----------------------------------|
| 1963 | 5,882 | - |
| 1964 | 6,285 | 6.85 |
| 1965 | 7,002 | 11.41 |
| 1966 | 7,704 | 10.03 |
| 1967 | 8,339 | 8.24 |
| 1968 | 9,176 | 10.04 |
| 1969 | 10,012 | 9.11 |
| 1970 | 11,111 | 10.98 |
| 1971 | 12,217 | 9.95 |
| 1972 | 13,792 | 12.89 |
| 1973 | 15,246 | 10.54 |
| 1974 | 16,257 | 6.63 |

Source: Report to Contributors for The Year Ended October 31,
1972, Teachers' Superannuation Commission, Toronto, 1972,
p.5., and subsequent Reports.

TABLE 5
VALUATION BALANCE SHEET
as at December 31, 1972
(in \$1,000's)

Assets and Unfunded Liability

| | |
|--|---------------------------|
| Fund ¹ | \$1,213,329 |
| Unfunded liability amortization pay- ments outstanding on the valuation date ² | 44,713 |
| Present value of members' future contributions ³ | 924,920 |
| Present value of matching future contributions | 924,920 |
| Unfunded liability | <u>557,877</u> |
| Total assets and unfunded liability | <u><u>\$3,665,759</u></u> |

Liabilities

| | |
|--|---------------------------|
| Present value of future payments to current pensioners and their eligible spouses | \$ 516,711 |
| Present contributors: present value of future | |
| - retirement pensions (A & B) | \$2,417,086 |
| - disability pensions (C & CB) | 112,434 |
| - spouses' pensions payable on death after retirement (D) | 206,601 |
| - spouses' pensions payable on death before retirement (D) | 79,590 |
| - vested pensions (F) | 193,420 |
| - refunds of members' contributions | <u>64,752</u> |
| | 3,073,883 |
| Net liability for inactive members | 58,556 |
| Allowance for future expenses ⁴ | <u>16,609</u> |
| Total liabilities | <u><u>\$3,665,759</u></u> |

¹The book value of the Fund on December 31, 1972 was estimated from the auditors' report on the Fund as of October 31, 1973. The Fund value shown above is equal to that estimated December 31, 1972 book value, adjusted to reflect a yield on invested assets equivalent to the valuation interest assumption.

²This amount, together with interest, was paid into the Fund by the Province after the valuation date.

³In most cases, the Province makes the matching contributions.

⁴It was assumed that the ratio of administration expenses to active members' payroll would remain at a constant level based on recent experience.

Source: The Seventeenth Report of the Actuary as at December 31, 1972,
p.4.

TABLE 6
TEACHERS' SUPERANNUATION FUND
STATEMENT OF ASSETS AND LIABILITIES
October 31, 1974
(with comparative figures of October 31, 1973)

| <u>ASSETS</u> | | <u>1974</u> | <u>1973</u> |
|---|----|------------------------|------------------------|
| Cash | \$ | | \$ 1,014,283 |
| Receivable from Province of Ontario | | | |
| Contributions by Province | | 60,780,613 | 56,516,285 |
| Interest on contributions | | 5,313,593 | 4,940,793 |
| Minimum Pension and Escalation Subsidy Payments from Province | | 1,069,385 | 2,450,383 |
| Receivable from school boards, net | | 278,600 | 230,837 |
| Short term notes, at cost plus accrued interest of \$96,630 (\$2,769 in 1973) | | 20,846,630 | 1,752,769 |
| Investments and interest accrued thereon | | 1,318,545,249 | 1,117,486,099 |
| | | <u>\$1,406,834,070</u> | <u>\$1,184,391,449</u> |
| <u>LIABILITIES</u> | | | |
| Bank advances | | 130,862 | |
| Accounts payable and accrued liabilities | | 1,092,866 | 995,537 |
| | | <u>\$1,223,728</u> | <u>\$995,537</u> |
| <u>CAPITAL FUND</u> | | | |
| Balance at beginning of year | | 1,183,395,912 | 1,041,168,987 |
| Add excess of revenue over expenditure for the year | | 222,214,430 | 142,226,925 |
| Balance at end of year | | <u>1,405,610,342</u> | <u>1,183,395,912</u> |
| | | <u>\$1,406,834,070</u> | <u>\$1,184,391,449</u> |

Source: Report to Contributors for the Year Ended October 31, 1974, p.8.

TABLE 7
TEACHERS' SUPERANNUATION FUND
INVESTMENTS 1974
(with comparative figures for 1973)

Investments

Province of Ontario bonds
at par value

| | <u>1974</u> | <u>1973</u> |
|----------------------------|---------------|---------------|
| 6% due November 1, 1982 | \$ 74,200,000 | \$ 74,200,000 |
| 6% due November 1, 1987 | 176,000,000 | 176,000,000 |
| 6% due November 1, 1992 | 454,500,000 | 454,500,000 |
| 8.57% due May 1, 1996 | 18,000,000 | 18,000,000 |
| 8.57% due November 1, 1996 | 74,000,000 | 74,000,000 |
| 8.57% due January 1, 1997 | 18,000,000 | 18,000,000 |
| 8.57% due March 30, 1997 | 62,000,000 | 62,000,000 |
| 7.86% due May 1, 1997 | 25,500,000 | 25,500,000 |
| 7.86% due November 1, 1997 | 84,500,000 | 84,500,000 |
| 7.86% due January 1, 1998 | 9,500,000 | 9,500,000 |
| 8.06% due April 2, 1993 | 50,000,000 | |
| 8.06% due May 1, 1993 | 32,000,000 | |
| 8.06% due October 1, 1993 | 5,000,000 | |
| 8.06% due November 1, 1993 | 92,000,000 | |
| 8.06% due January 1, 1994 | 16,000,000 | |

Deposit with the Province of
Ontario to be used in
purchasing Province of
Ontario bonds

88,600,000 87,000,000

1,279,800,000 1,083,200,000

Interest accrued thereon

38,745,249 34,286,099

\$1,318,545,249 \$1,117,486,099

Note: The comparative figures for 1973 have been reclassified to conform with the financial statement presentation adopted for 1974.

Source: Report to Contributors for the Year Ended October 31, 1974, p.10.

Liabilities

(a) Initial Unfunded Liability

The valuation of the Fund as at December 31, 1966, disclosed an unfunded liability of \$328,282,000. When a liability is unfunded, it means that no immediate provision has been made to liquidate it during the lifetime of the members on whose behalf the liability was incurred. Under the provision of The Pension Benefits Act, 1965, and the Regulations made under the Act an "initial unfunded liability" means the amount which on January 1, 1965, or the date on which the plan qualifies for registration, or subsequently as the result of an amendment, the assets are required to be augmented to ensure that the plan is fully funded. Consequently, for the Teachers' Superannuation Fund the initial unfunded liability was \$328,282,000.

For any private pension plan it is necessary that the initial unfunded liability be amortized over a period of years. However, when a pension plan is administered for the employees of a government, the special payments in respect of an initial unfunded liability existing on January 1, 1965, may be limited to the annual amount required to prevent any increase in such liability.

In order to keep the \$328,282,000 from growing at five per cent interest, the province should have been paying at least five per cent of \$328,282,000, or \$16,414,100, annually into the Fund for each year of the years 1967 to 1969 inclusive. The actual amount paid for each of 1967, 1968, and 1969 was \$14,889,000. The shortfall was, therefore, \$1,525,100 for each of these three years, or a total of \$4,575,300. These three extra payments accumulated at five per cent interest amounted to some \$4,807,900 at December 31, 1969.

The requirement that the initial unfunded liability in 1966 of \$328,282,000 continue to be subject to five per cent interest meant that an annual payment of \$16,414,000 be paid into the Fund by the province for the years 1970, 1971 and 1972 as well. The actual payment continued to be below this level so that at December 31, 1972, the province owed the Fund an amount in addition to that of \$4,807,900

due at December 31, 1969.

From January 1, 1973, the required interest rate is six per cent of \$328,282,000, or an annual payment of \$19,696,920.

(b) Residual Unfunded Liability

A residual unfunded liability is any liability created in addition to the initial unfunded liability. The valuation as at December 31, 1969, revealed that the total unfunded liability had increased to \$382,265,000 or by \$53,983,000 during the period from 1966. If the amount of some \$4,807,900 for deficiency payments by the province on the interest on the initial unfunded liability is deducted, the net increase in the total unfunded liability is some \$49,175,100.

The total unfunded liability at December 31, 1972, was \$557,877,000. Since the initial unfunded liability was \$328,282,000, at December 31, 1966, the residual unfunded liability at December 31, 1972, was \$229,595,000 made up as shown in Table 8.

TABLE 8
RESIDUAL ACTUARIAL LIABILITY
1967 to 1972 inclusive

| | | |
|------|---|---------------|
| 1969 | Unfunded actuarial liability 1967-1969 inclusive | \$ 53,983,000 |
| 1972 | Unfunded actuarial liability 1970-1972 inclusive | 175,612,000 |
| | Total residual unfunded liability at December 31, 1972 | \$229,595,000 |

Under the requirements of The Pension Benefits Act, 1965, and the Regulation, the province is required to amortize the residual unfunded liability of \$229,595,000 at December 31, 1972. This must be done during the seventeen-year-period 1973 to 1989 inclusive. The minimum payment required to achieve this objective is \$21,913,650 per year for a total payment of \$372,532,050, with \$142,937,050 being interest on the residual unfunded liability.

The increase of \$175,612,000 in the residual unfunded liability during the period 1970 to 1972 inclusive was due in large part to amendments to The Teachers' Superannuation Act providing substantially improved benefits. Until November 30, 1971, a member was eligible to retire on the "A" pension if the member had completed 40 years credited service regardless of age, or had completed 35 years credited service and had attained age 62. After November 30, 1971, a member was able to retire on an "A" pension if the sum of the contributor's age and credited service was at least 90 years.

The "D" pension was extended to the widowers of female members on the same terms as to the widows of male members, effective December 17, 1971.

A widow or widower who is also a teacher may draw a "D" pension as well as the pension provided by his or her own service. Before December 17, 1971, a person could draw only one pension under the Act.

In their Seventeenth Report the actuaries reported that they had made calculations which indicated that the increase in liabilities due to amendments to the plan granting increased benefits during the period 1967 to 1972 inclusive exceeded \$229,595,000. Consequently, they found that the plan did not have an experience deficiency as of December 31, 1972.

Other factors that increased the unfunded liability included adoption of an assumed annual future increase in general salary levels of three per cent (none used in previous valuations) combined with an increase in the assumed interest rate from five to six per cent. The general salary increases experienced during the three-year period ending December 31, 1972, also contributed to the increase in the unfunded liability.

Combined Annual Payments on Unfunded Liabilities

At the present time the province is required to make an annual payment of \$19,696,920 as interest on the initial unfunded liability of \$328,282,000 at six per cent and this will be a continuing obligation of the province

unless it makes additional payments to reduce the initial unfunded liability, an unlikely possibility at the present time.

In addition, the province must make a payment of \$21,913,650 per year for each year during the period to December 31, 1989, to amortize the residual unfunded liability of \$229,595,000 at December 31, 1972, at six per cent interest.

Therefore, the total payment required until December 31, 1989, will be \$41,610,570 per year and \$19,696,920 per year thereafter.

Revenue and Expenditure of Fund, 1974

The revenue and expenditure statement for the fiscal year ended October 31, 1974, is shown in Table 9. Some comparative data for the Fund for the period 1963 to 1974 inclusive are provided in Table 10.

Revenue

(a) Contributions from Participants

During the year the contributions of participants increased from \$64,429,708 in 1973 to \$68,219,406 in 1974, or by \$3,789,698, or by 5.9 per cent.

(b) Contributions by Province on Behalf of Employers

Under the provisions of The Teachers' Superannuation Act,¹ the Treasurer of Ontario is required annually to place to the credit of the Teachers' Superannuation Fund a sum equal to the contributions made by or on behalf of persons to whom the Act and the Regulation apply. All such sums are to be credited to the Fund on June 1 in the preceding fiscal year to that in which the payment is made and the Treasurer is required to pay interest thereon for the period from June 1 to the last day of this fiscal year in which the sums are actually received at the rate of six per cent per annum, compounded half-yearly. Provision is made for certain exceptions whereby the payment

¹The Teachers' Superannuation Act, R.S.O., 1970, Chap. 455, Section 22.

TABLE 9
TEACHERS' SUPERANNUATION FUND
STATEMENT OF REVENUE AND EXPENDITURE
Year ended October 31, 1974
(with comparative figures for 1973)

| | <u>REVENUE</u> | |
|---|---------------------|---------------------|
| | <u>1973-1974</u> | <u>1972-1973</u> |
| Contributions from participants | | |
| (a) Teaching for Ontario boards | \$ 64,605,639 | \$ 60,438,482 |
| (b) Teaching in designated private schools | 840,183 | 869,340 |
| (c) Outside services | 139,979 | 121,244 |
| (d) Miscellaneous | 2,633,605 | 3,000,642 |
| | <u>68,219,406</u> | <u>64,429,708</u> |
| Contributions from the Provincial Treasury per section 22 of <u>The Teachers Superannuation Act</u> | 60,780,613 | 56,516,285 |
| Interest on contributions | 5,313,593 | 4,940,793 |
| | <u>66,094,206</u> | <u>61,457,078</u> |
| Special payments from the Provincial Treasury | | |
| (a) Interest on the 1966 actuarial unfunded liability | 30,137,600 | 9,214,000 |
| (b) Amortization of post 1966 actuarial unfunded liability and interest thereon | 46,074,800 | NIL |
| (c) Minimum pension subsidy | 12,124,480 | 7,486,146 |
| | <u>\$88,336,880</u> | <u>\$16,700,146</u> |

TABLE 9 (Continued)

TEACHERS' SUPERANNUATION FUND

STATEMENT OF REVENUE AND EXPENDITURE

Year ended October 31, 1974

(with comparative figures for 1973)

| | <u>REVENUE</u> | |
|---|----------------------|----------------------|
| | <u>1973-1974</u> | <u>1972-1973</u> |
| Interest earned | | |
| (a) Province of Ontario bonds | \$ 84,253,850 | \$ 69,851,191 |
| (b) Temporary investments | 431,221 | 2,414,428 |
| (c) Repayment of refunds and sundry interest | 966,588 | 927,608 |
| | <u>85,651,659</u> | <u>73,193,227</u> |
| Transfers from other pension funds | 1,839,205 | 405,159 |
| Repayments of refunds by former participants resuming teaching | 387,197 | 353,895 |
| | <u>\$310,528,553</u> | <u>\$216,539,213</u> |

Source: Report to Contributors for the Year Ended October 31, 1974,
Teachers' Superannuation Commission, Ontario, 1975, p.9.

TABLE 10
COMPARATIVE DATA FOR THE FUND
1963 - 1974 inclusive

| <u>For the Year Ended October 31</u> | <u>Gross Revenue Including Interest</u> | <u>Teachers' Contribution</u> | <u>Payments to Teacher Pensioners and Estates</u> |
|--|---|-----------------------------------|---|
| 1963 | \$ 50,821,000 | \$17,697,000 | \$15,553,000 |
| 1964 | 56,791,000 | 19,575,000 | 18,637,000 |
| 1965 | 63,544,000 | 21,820,000 | 20,387,000 |
| 1966 | 87,484,000 | 24,619,000 | 23,681,000 |
| 1967 | 98,443,000 | 28,437,000 | 26,517,000 |
| 1968 | 116,535,000 | 34,362,000 | 30,742,000 |
| 1969 ^a | 164,929,000 | 41,801,000 | 35,259,000 |
| 1970 | 142,663,000 | 45,187,000 | 42,442,000 |
| 1971 | 171,196,000 | 52,263,000 ^b | 52,548,000 |
| 1972 | 206,959,000 | 56,545,000 ^b | 60,020,000 |
| 1973 | 215,709,000 ^c | 60,873,000 ^{b,c} | 72,425,000 |
| 1974 | 310,528,553 | 64,605,639 | 86,252,616 |

Note: ^a The gross revenue during 1969 was considerably higher due to a change in policy effective January 1, 1969, whereby superannuation amounts deducted by boards were sent to the Commission on a monthly basis.

^b The sum does not include direct payments made to the Fund for past service.

^c The figures for 1973 are slightly different than those shown elsewhere in this report because of changes in accounting procedures in 1974.

Source: Report to Contributors for the Year Ended October 31, 1973,
Teachers' Superannuation Commission, Ontario, 1974, p.3.

is made by an organization or individual.

The amount paid by the Provincial Treasury on behalf of school boards and for teachers on its staff as the employer's contribution increased to \$60,780,613 in 1974 from \$56,516,285 in 1973, or by \$4,264,328, or 7.5 per cent. The interest at six per cent per annum on the employer's contribution between the date when the liability was incurred and the date of payment by the province to the Teachers' Superannuation Fund some months later increased to \$5,313,593 in 1974 from \$4,940,793 in 1973, or by \$372,800, or 7.5 per cent. The payments from the province as the employer's share of contributions and other payments by the province are shown in Table 11.

The Teachers' Superannuation Act also requires that when "the payments into the Fund in any year are insufficient to make the required payments out of the Fund, the deficiency shall be made out of the Consolidated Revenue Fund"² of the province. In 1963, the teachers' contributions alone were more than enough to meet the payments to teacher pensioners and estates (Table 10). This continued to be true until 1970 because of the substantial increase in the number of new, young teachers entering the profession in the 1960s when enrolment was increasing. After 1970, when the enrolment began to stabilize and then to decline and when more teachers retired, payments out of the Fund exceeded the teachers' contributions alone. The excess was substantially greater in 1973 and 1974 and was accelerating rapidly.

It is inevitable, given a static or declining enrolment, a reduction in the number of teachers, an aging teacher population, and increasing salaries on which pensions are calculated, that payments to teacher pensioners and estates will exceed not only the teachers' contributions alone but also the combined contributions of teachers and the contributions of government on behalf of employing school boards. Unless there are unforeseen developments, the province will ultimately be responsible for additional contributions from the Consolidated Revenue Fund as provided for in Section 8 of the Act. The

²The Teachers' Superannuation Act, R.S.O., 1970, Chapter 455, Section 8.

TABLE 11

PROVINCE OF ONTARIO CONTRIBUTIONS TO
THE TEACHERS' SUPERANNUATION FUND

| | 1976-77 ^c | 1975-76 ^c | 1974-75 ^b | 1973-74 ^b | 1972-73 ^b | 1971-72 ^b | 1970-71 ^b | 1969-70 ^b |
|---|-------------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| Compassionate allowances for ex-teachers | \$ 2,200 | \$ 2,200 | \$ 2,120 | \$ 2,120 | \$ 2,120 | \$ 2,120 | \$ 2,120 | \$ 2,120 |
| Payment on unfunded liability of the Teachers' Superannuation Fund | 19,697,000 | 19,697,000 | 23,197,440 | 30,137,600 | 9,214,000 | 17,932,000 | 14,889,000 | 2,511.54 |
| Provision to increase, where applicable, annual allowances under The Teachers' Superannuation Act for former contributors, etc. | 21,913,700 | 21,913,700 | 45,280,560 | | | | | 14,889,000.00 |
| | | | 55,909,800 | | | | | |
| Provision for supplementary retirement benefits of from 2 per cent to 50 per cent of annual allowances, etc. | | | | 2,346,954 | 2,225,326 | 2,053,491 | 2,446,037 | 449,639.40 |
| Provision to increase the annual allowance to pre-1972 pensioners by providing 4 per cent and 2 per cent increases, etc. | | | | | | | | |
| | 25,649,400 ^d | 17,050,000 | 13,190,837 | 3,689,485 | 3,836,846 | 3,963,447 | 1,013,364 | 600,000.00 |
| Total | 67,262,300 | 58,662,900 | 137,580,757 | 38,331,898 | 15,278,292 | 23,951,058 | 18,350,521 | 15,941,150.94 |
| Teachers' Superannuation Fund (The Teachers' Superannuation Act) | 85,815,600 | 70,107,000 | 65,415,322 | 60,873,376 | 58,131,273 | 51,004,415 | 45,500,311 | 48,547,104.00 |
| GRAND TOTAL | \$153,077,900 | \$128,769,900 | \$202,996,079 | \$99,205,274 | \$73,409,565 | \$74,955,473 | \$63,850,832 | \$64,488,254.94 |

Note: ^a The fiscal year for the Province is April 1 to March 31.

Source: ^b Public Accounts, Queen's Printer for Ontario, Toronto;
^c Expenditure Estimates, Social Policy and Development Field, Vol. 4, Queen's Printer, Toronto.

^d Including \$7,127,400 from the Consolidated Revenue Fund to meet all superannuation adjustment benefits and other moneys required to be paid under The Superannuation Adjustment Benefits Act, 1975, to recipients who have not contributed to the Adjustment Fund or to their dependants or to their estates or the estates of such dependants as required by Section 11, subsection (2) of the Act.

magnitude of these additional contributions required from the province is difficult to estimate at the present time but, combined with the other obligations the province has to the Fund, the implications for provincial financing are serious.

(c) Special Payments from Provincial Treasury

Reference has already been made to the payments required from the province for interest on the initial unfunded liability and for amortization of the residual unfunded liability and interest thereon. In the Fund's fiscal year 1973-74, the province paid \$30,137,600 and \$46,074,800 respectively for these two purposes. These amounts differ from the amounts shown as payments by the province in its fiscal year 1973-74 because of the overlap in the fiscal years of the two bodies. The amount of \$12,124,480 was received from the province in the Fund's fiscal year 1973-74 to provide for special subsidies to pensioners of the Fund.

(d) Interest Earned

The Fund earned interest on Province of Ontario bonds in 1973-74 of \$84,253,850 at the rates of interest shown in Table 7. The interest earned on temporary investments was \$431,221. Teachers making repayment of refunds granted earlier and interest on those repayments together with other sundry interest amounted to \$966,588. The total under these headings amounted to \$85,651,659.

(e) Miscellaneous

Transfers from other pension funds with which the Fund has reciprocal agreements amounted to \$1,839,205 in 1973-74. Repayments of refunds by former participants resuming teaching amount to \$387,197.

Expenditure

Expenditures from the Fund for each of the fiscal years 1972-73 and 1973-74 are shown in Table 12. The most significant figure is the excess of revenue over expenditure. In 1972-73, the amount was \$142,226,925. In 1973-74, the corresponding amount was \$222,214,430, an increase of \$79,987,505 in one year. These substantial gains can lead to misunderstanding about the actuarial position of the Fund. It is important to recognize that a very large proportion of the number of contributors are relatively young teachers who began their careers during the expansion period of 1950s and 1960s and that few of these contributors are yet entitled to pensions. The retired teachers on pension represent a small proportion of the total teaching staff at the present time. Consequently, the greatly increased number of teachers in service compared with the relatively small proportion yet eligible for pension means that the excess of revenue over expenditure is increasing.

The second factor to be considered is the substantial increases in salaries that have occurred in recent years. These have greatly increased the revenues of the Fund without affecting its expenditures significantly. The combination of more teachers in service at higher rates of salary accounts for the magnitude of the excess of revenue over expenditure.

But the present teaching body is building up a liability for the Fund because of the large number of teachers who will ultimately become eligible for pensions at much higher rates. Given the strong possibility of a relatively static enrolment in the foreseeable future, and a consequent stability in the number of teachers in service, the revenues will not nearly match the expenditures. The significant point is the inadequacy of the excess of current revenue over current expenditure to meet the liability created by the additional experience gained by each teacher during the same current year at the salary received during that year. The cumulative effect of these factors could mean that the excess of expenditure over revenue for the Fund could in future

TABLE 12

TEACHERS' SUPERANNUATION FUND
STATEMENT OF REVENUE AND EXPENDITURE

Year ended October 31, 1974
(with comparative figures for 1973)

EXPENDITURE

| | <u>1973 - 1974</u> | <u>1972 - 1973</u> |
|--|---------------------|---------------------|
| Pensions Paid | | |
| Service | \$ 67,133,476 | \$ 55,860,092 |
| Disability | 4,515,220 | 3,955,749 |
| Dependants | 3,466,056 | 2,918,872 |
| Joint annuities | 31,176 | 28,272 |
| | <hr/> 75,145,928 | <hr/> 62,762,985 |
| Refunds of contributions and interest thereon | | |
| To participants who have withdrawn | 10,705,168 | 9,346,284 |
| To representatives of deceased participants | 401,520 | 314,180 |
| To participants who have defaulted payments | - | 1,885 |
| | <hr/> 11,106,688 | <hr/> 9,662,329 |
| Transfers to other pension funds | 944,190 | 830,290 |
| Administration expenses | 1,117,317 | 1,056,664 |
| Total expenditure | 88,314,123 | 74,312,288 |
| Excess of revenue over expenditure for the year, added to capital | 222,214,430 | 142,226,925 |
| | <hr/> \$310,528,553 | <hr/> \$216,539,213 |

Note: In 1972, the sum of \$759,282 was paid for the new office building and, under the Act, was charged to administration expenses.

Source: Report to Contributors for the Year Ended October 31, 1974,
Teachers' Superannuation Commission, Ontario, 1975, p. 9.

years reach horrendous amounts and under existing legislation could create real problems of funding for the province.

Pension Subsidies

Commencing in 1967, the province has from time to time introduced a number of subsidies payable to pensioners of the Fund. (Table 13)

(i) Low Pension Subsidies

In the fiscal year 1966-67, provision was made under The Teachers' Superannuation Act to increase annual allowances, where applicable, to \$1,200 and \$600 for former contributors and their dependants respectively. The financing of these supplementary payments was by a special grant from the province to the Fund. The Fund in turn made the payments to the recipients. No additional liability was created for the Fund because of this additional commitment. The province assumed responsibility for the added cost involved in the establishment of the new minimum payments. The effective date of the increased allowances was January 1, 1967. The cost to the province for the period January 1, 1967, to March 31, 1967, was \$117,865.08. There was, of course, a continuing expenditure for this purpose in subsequent years, as shown in Table 13.

Effective January 1, 1970, the minimum levels were increased from \$1,200 and \$600 to \$2,100 and \$1,050. The initial amount required to pay for this increase for the period January 1, 1970, to March 31, 1970 was provided by a Special Warrant of the province in the sum of \$600,000.

In 1970-71, the total expenditure by the province to pay for the new minima for a full year was \$2,446,037.

In 1974-75, a further increase in the minimum pension levels brought them to \$2,400 and \$1,200.

(ii) Cost of Living Subsidies

In 1971, the province provided a special subsidy to help meet the

TABLE 13

PENSION SUBSIDIES PAYABLE BY THE PROVINCE OF ONTARIO FROM THE CONSOLIDATED REVENUE
FUND TO FORMER CONTRIBUTORS TO THE TEACHERS' SUPERANNUATION FUND AND THEIR DEPENDANTS
1966-67 to 1975-76 inclusive

| <u>Fiscal Year</u> | <u>Amount</u> | <u>Purpose</u> |
|--------------------|-------------------|--|
| 1966-67 | (a) \$ 117,365.08 | (a) To increase, where applicable, annual allowances to a minimum of \$1,200 and \$600 for former contributors or their dependants respectively, effective January 1, 1967. |
| 1967-68 | (a) 459,485.60 | (a) |
| 1968-69 | (a) 447,009.34 | (a) |
| 1969-70 | (a) 449,639.40 | (a) |
| | (b) 600,000.00 | (b) To increase, where applicable, annual allowances to a minimum of \$2,100 and \$1,050 for former contributors or their dependants respectively, effective January 1, 1970. |
| | (Special warrant) | |
| 1970-71 | (a) 2,446,037.00 | (a) (b) |
| | (c) 1,013,364.00 | (c) To increase retirement benefits of from 2 per cent to 50 per cent of annual allowances depending on date of retirement of contributors, effective January 1, 1971. |
| | (Special Warrant) | |
| 1971-72 | (a) 2,053,491.00 | (a) (b) |
| | (c) 3,963,447.00 | (c) |
| 1972-73 | (a) 2,225,326.00 | (a) (b) |
| | (c) 3,836,846.00 | (c) |
| 1973-74 | (a) 2,346,954.00 | (a) (b) |
| | (c) 3,689,485.00 | (c) |
| | (d) 2,155,739.00 | (d) To increase the annual allowance to pre-1972 pensioners and their dependants by changing the minimum base amount paid or by providing 4 per cent or 2 per cent increases, where applicable, for those who retired prior to 1971 and in 1971 respectively, effective January 1, 1973. |

TABLE 13 (Continued)

PENSION SUBSIDIES PAYABLE BY THE PROVINCE OF ONTARIO FROM THE CONSOLIDATED REVENUE
FUND TO FORMER CONTRIBUTORS TO THE TEACHERS' SUPERANNUATION FUND AND THEIR DEPENDANTS

| <u>Fiscal Year</u> | <u>Amount</u> | <u>Purpose</u> |
|--------------------|---------------------------|---|
| 1974-75 | | |
| (a) (b) | | (a) (b) |
| (c) (d) | 13,190,837.00 | (c) (d) |
| (e) | | (e) |
| (f) | | (f) |
| | | To increase, where applicable, annual allowances to a minimum of \$2,400 and \$1,200 for former contributors or their dependants respectively. |
| | | To increase the annual allowance to pre-1974 pensioners and their dependants by providing 8 per cent or 4 per cent increases, where applicable, for those who retired prior to 1973 and in 1973 respectively, effective January 1, 1974. |
| 1975-76 | | |
| (a) (b) | | (a) (b) |
| (c) (d) | | (c) (d) |
| (e) (f) | 17,050,000.00 | (e) (f) |
| (g) | | (g) |
| | | To increase the annual allowance to pre-1975 pensioners and their dependants by providing an 8 per cent increase, where applicable, for those who retired in 1973 and earlier and to those whose pensions began in 1974 a pro-rated per cent according to the number of months during which the individual received a pension in 1974, both effective January 1, 1975. |
| 1976-77 | | |
| (a) (b) | | (a) (b) |
| (c) (d) | | (c) (d) |
| (e) (f) | 18,522,000.00 | (e) (f) |
| (g) (h) | 7,127,400.00 ^a | (g) (h) |
| | | To increase the annual allowance to pre-1975 pensioners and their dependants by providing a maximum increase of 8 per cent, where applicable, for those who retired in 1974 and earlier and to those whose pensions began before September, in 1975, a pro-rated per cent according to the number of months during which the individual received a pension in 1975, both effective January 1, 1976. |

Source: Public Accounts for years 1966-67 to 1974-75 inclusive.

Expenditure Estimates for years 1975-76 and 1976-77 inclusive.

Note: ^a As required by Section 11, subsection (2) of The Superannuation Adjustment Benefits Act, 1975.

increased cost of living for those already on pension. The increase was two per cent of the original pension for each year the pension had been in force up to a limit of 50 per cent for those who retired in 1950 or earlier. The cost to the province for the adjustment for the period January 1, 1971, to March 31, 1971, was met by a Special Warrant in the amount of \$1,013,364. For the first full year in 1971-72, the cost was \$3,963,447.

Effective January 1, 1973, a further adjustment was made whereby pensions having an inception date prior to 1971 were increased by four per cent and those granted in 1971 were increased by two per cent. The cost for the period January 1, 1973, to March 31, 1973, was \$2,155,739.

Effective January 1, 1974, a still further adjustment was made whereby pensions having an inception date in 1972 or earlier were granted an increase of eight per cent and those begun in 1973 were given an increase of four per cent.

In 1975, a fourth adjustment was made whereby pensions having an inception date in 1973 or earlier were increased by eight per cent and those pensions granted in 1974 were increased by a pro-rated per cent according to the number of months during which the individual received a pension in 1974. The effective date of the adjustments was January 1, 1975.

Effective January 1, 1976, a fifth adjustment provided an increase of eight per cent in pensions having an inception date in 1974 or earlier. Because the Consumer Price Index had increased by 11.3 per cent, an additional 3.3 per cent was carried over to be granted in a subsequent year or years when the Consumer Price Index shows an increase of less than eight per cent, provided always that the increase in pension in any one year does not exceed the maximum allowable eight per cent. For pensions having an inception date in 1975, the percentage increase will be pro-rated to take into account the number of months on pension during the first year.

The cumulative effect of the adjustments is illustrated by the example in Table 14. Using \$2,400 as the amount of the original

TABLE 14
EXAMPLE OF CUMULATIVE EFFECT OF COST
OF LIVING SUBSIDIES ON PENSION
OF \$2,400, BEGINNING JANUARY 1, 1961

Basic Data

| | |
|-----------------------------|-----------------|
| Effective date of pension: | January 1, 1961 |
| Amount of original pension: | \$2,400.00 |

Adjustments

| <u>Adjustment Number</u> | <u>Effective Date</u> | <u>Adjustment</u> | <u>Amount of Adjustment</u> | <u>Amount of Revised Pension</u> |
|------------------------------|---------------------------|--|---------------------------------|--------------------------------------|
| | | | | \$2,400.00 |
| 1 | January 1, 1971 | 2% per year for 10 years 20% | 20% of \$2,400 = 480.00 | 2,880.00 |
| 2 | January 1, 1973 | 4% for pen- sions in effect before 1971 | 4% of \$2,880 = 115.20 | 2,995.20 |
| 3 | January 1, 1974 | 8% for pen- sions in effect before 1973 | 8% of \$2,995.20 = 239.61 | 3,234.81 |
| 4 | January 1, 1975 | 8% for pen- sions in effect before 1974 | 8% of \$3,234.81 = 258.78 | 3,493.59 |
| 5 | January 1, 1976 | 8% of pen- sions in effect before 1975 or pro- rated for num- ber of months in 1975. | 8% of \$3,493.59 = 279.48 | 3,773.07 |

pension in 1961, the increase was from \$2,400 on December 31, 1970, to \$3,773.07 on January 1, 1976, or \$1,337.07, or 57.2 per cent.

The total amount required to pay the five cost-of-living adjustments has been and will continue to be a charge on the Consolidated Revenue Fund of the province. No amount of past adjustments creates a liability for the Teachers' Superannuation Fund and no portion of the cost is included in the actuarial calculations of the Fund. The recipients of the increased payments as a result of the five adjustments in the amount of the original pension did not, during their teaching years, make contributions to fund the amount of the adjustments.

(iii) Combined Cost of Subsidies

Since the subsidies were first instituted in 1967, the combined actual cost of the low pension subsidies and of the cost-of-living subsidies to March 31, 1975, is shown in Table 15.

TABLE 15

COST OF SUBSIDIES TO RETIRED PENSIONERS

1966-67 to 1974-75 inclusive

| <u>Fiscal Year</u> | <u>Amounts</u> |
|--------------------|------------------------|
| 1966-67 | \$ 117,865.08 |
| 1967-68 | 459,485.60 |
| 1968-69 | 447,009.34 |
| 1969-70 | 449,639.40 |
| | 600,000.00 |
| 1970-71 | 2,446,037.00 |
| | 1,013,364.00 |
| 1971-72 | 2,053,491.00 |
| | 3,963,447.00 |
| 1972-73 | 2,225,326.00 |
| | 3,836,846.00 |
| 1973-74 | 2,346,954.00 |
| | 3,689,485.00 |
| | 2,155,739.00 |
| 1974-75 | 13,190,837.00 |
| Total | <u>\$38,995,525.42</u> |

Source: Public Accounts, Ontario.

The estimated expenditures on the two types of subsidy for the fiscal years 1975-76 and 1976-77 are set out below:

| <u>Fiscal Year</u> | <u>Amount of Subsidies</u> | |
|--------------------|----------------------------|---------------------|
| 1975-76 | | \$17,050,000 |
| 1976-77 | \$18,522,000 | |
| | <u>7,127,400</u> | <u>25,649,400</u> |
| | | <u>\$42,699,400</u> |

Source: Expenditure Estimates, Ontario, Vol. 4, Social Development Policy Field.

The combined actual cost for the period 1966-67 to 1974-75 inclusive of \$38,995,525.42 and the estimated cost for the years 1975-76 and 1976-77 inclusive of \$42,699,400 is, therefore, \$81,694,925.42.

As has already been pointed out, the province assumed full financial responsibility for payment from the Consolidated Revenue Fund of low pension and cost-of-living subsidies granted to pensioners of the Teachers' Superannuation Fund between 1967 and 1975 inclusive. It is committed to continuation of payment of the cost of low pension subsidies to these and future pensioners and to continuation of the first four cost-of-living adjustments granted to those on pension before 1976.

In addition, the province is committed to payment from the Consolidated Revenue Fund of the amount of the cost-of-living increases for all pensioners who retired before September 1, 1975, and who are and will be entitled to improved benefits in accordance with the provisions of Section 11, subsection (2) of The Superannuation Adjustment Benefits Act, 1975. The first of these increase was the fifth adjustment, effective January 1, 1976, to which reference has already been made, and which amounts to an estimated \$7,127,400 for the province's fiscal year 1976-77.

Recipients of these benefits in the past and in the future did not, while they were employed, make contributions to fund these benefits. School boards were not involved but the province did not, in its

capacity as representative of the employing school boards, make any contribution to fund the same benefits. Consequently, when the benefits were granted, it became necessary to pay for them from the Consolidated Revenue Fund.

The Superannuation Adjustment Benefits Act, 1975

Under legislation passed in July, 1975, for a teacher who is employed in the public education system, the teacher and the province will each pay into an Adjustment Fund an amount calculated at one per cent of the teacher's salary. In future, adjustment in the cost-of-living will be payable from the Adjustment Fund to pension recipients who have contributed to that Fund.

Consequently, the province and the teachers will share in the cost of cost-of-living adjustment benefits for new pensioners who have taught after September 1, 1975, and who retired subsequent to that date. The amount included in the Estimates of the province for 1976-77 for its contribution under Section 8, subsection (1) of The Superannuation Adjustment Benefits Act, 1975, is \$21,877,000. This represents an increase in payment by the province over its other payments under The Teachers' Superannuation Act in 1966-67 of \$153,077,900, for a total of \$174,954,000 in that one year.

General Comments:

The Teachers' Superannuation Fund is rigidly controlled by the government. The Teachers' Superannuation Commission has nominal responsibility for administration of the Fund but its powers are severely limited. Six of the eleven members are appointed by the Minister of Education while five are representative of the five teacher organizations. The provisions of The Teachers' Superannuation Act give virtual control of the Fund in any substantive matters to the Treasurer of Ontario. For example, all securities belonging to the Fund must be deposited with the Treasurer and he is responsible for the safekeeping of all securities deposited with him.³

³The Teachers' Superannuation Act, R.S.O., 1970, Chapter 455, Section 7.

Consequently, the Commission is not permitted to invest its funds in other than Province of Ontario bonds. In this way, the province has a ready-made source of funds for a considerable portion of its borrowings.

The rate of interest to be paid on these borrowings is determined in the manner provided in the Act. The relevant section reads as follows:

"The Treasurer shall issue from time to time a Province of Ontario debenture in the amount, as determined by the Commission, of surplus funds accumulated in the Fund and not required for current expenditures, such debenture to be for a term of not more than twenty-five years and not less than twenty years and to bear interest payable half-yearly at a rate of interest not less than the weighted average yield to maturity of long term securities issued or guaranteed by the Province payable in Canadian dollars and sold to the public during the Province of Ontario fiscal year next preceding the date of the debenture"⁴

By contrast, the Ontario Municipal Employees Retirement Board is responsible for the management and administration of the Ontario Municipal Employees Retirement System and for recommending changes to the Act and regulations governing that Fund. The membership of the Board is more broadly representative with only three of eleven of the present members being officials of the Province of Ontario.

By an amendment to The Ontario Municipal Employees Retirement System Act in December, 1974, the Board was authorized to invest, commencing in 1975, a portion of available funds in marketable securities, within the limitations of The Pension Benefits Act. A quotation from the Annual Report of the Board describes the action taken under this authority.

"It was agreed that 20% of the funds available for investment in the period April 1, 1975 to March 31, 1976 (approximately \$36 million) would be invested in marketable securities. The Board spent considerable time during 1975 developing an approach to the investment of those funds and in October actual investments commenced. At year end approximately sixteen million dollars had been invested in marketable securities.

"The Board established an Investment Policy Committee comprising seven members. Four members are persons with senior investment experience in the private sector, one is a member of the Board and two members are from staff of the System. The Committee's responsibilities included the search for investment staff, the study and development of investment policy and the continual monitoring of

⁴ Ibid, Section 7, subsection (5).

investment purchases and sales.

"The investment policy recommended by the Investment Policy Committee and adopted by the Board included a heavy weighting towards NHA guaranteed mortgages and corporate and government bonds and limited investments in common stocks and real estate. At year end the investments in marketable securities of approximately \$16 million comprised 47% mortgages, 34% bonds, 4% common stock, 6% real estate and 9% in short term investments. The rate of return on this investment mix was approximately 10.50% at year end"⁵

In his letter of transmittal with the Board's Report, the Chairman of the Board stated in part as follows:

"OMERS continued a remarkable growth pattern through 1975 and at the end of the year over ninety-seven thousand local government employees were contributing to the System, almost ten thousand former members were receiving monthly pension cheques, and nine hundred and fifty municipalities and local boards from all over Ontario were participating in the System. Invested assets exceeded eight hundred million dollars, increasing yearly by almost two hundred million dollars. Actuarial valuations indicate no unfunded liabilities and the Fund has never had an experience deficiency."⁶

Among the contributors to the Ontario Municipal Employees Retirement System are employees of school boards who are not teachers. Consequently, two groups of employees who work for the same school board belong to two different superannuation funds with different degrees of representativeness on the administering boards, with varying degrees of authority and control, with different investment powers, and with different methods for recommending changes in the Acts and regulations governing their Funds. In addition, employees of a school board who are participants in the OMERS have the employer's contribution to their pension plan paid by the employing board while teachers have the employer's portion paid to the Teachers' Superannuation Fund not by their employer, the school board, but by the province through the Ministry of Education.

There are historical and other considerations that account for some of the differences to which reference has been made. There are, however, several anomalies that, regardless of their origin or initial justification, should now be removed and a more rational approach adopted in the

⁵Ontario Municipal Employees Retirement System, 1975 Annual Report,
Toronto, May 14, 1976, p. 2.

⁶Ibid, p. (i).

interests of both the participants in the Funds, the employers, and the taxpayers.

It is true that the pension plan provided for teachers under The Teachers' Superannuation Act is one of the best in existence anywhere. It is also true that the Fund has substantial actuarial unfunded liabilities for which the province must assume responsibility. In addition, other benefits are also being funded from the Consolidated Revenue Fund. Given the financial commitments of the province under existing provisions, it is our view that no amendments should be made to provide any additional benefits.

CHAPTER 3

THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATION

The Ontario Institute for Studies in Education was created by an Act of the Legislature in 1965. The objects of the Institute as stated in the Act are:

- "(a) to study matters and problems relating to or affecting education, and to disseminate the results of and assist in the implementation of the findings of educational studies;
- (b) to establish and conduct courses leading to certificates of standing and graduate degrees in education."¹

The new Institute assumed responsibility for the teaching and research functions formerly conducted by the Department of Graduate Studies and the Department of Educational Research respectively at the Ontario College of Education, University of Toronto. A third component was the Ontario Curriculum Institute which merged with the new organization. In June, 1966, an agreement was made for affiliation of the Institute with the University of Toronto for purposes of graduate instruction.

Graduate Studies

Until the establishment of The Ontario Institute for Studies in Education, the great majority of those in Ontario wishing to do graduate work in education had to go to other countries, usually to the United States but sometimes to Great Britain. While there was undoubtedly some attempt to relate instruction and research to the student's background in Ontario education and while much of research and literature may have had general applicability, nevertheless it was inevitable that the programs would be oriented to the country in which the institution was situated. Because of the relationship between education and the society of which it is a part, the lack of a first-rate graduate school of education placed Ontario at a serious disadvantage in so far as the advanced preparation of its educational personnel was concerned. The creation of the Institute provided the opportunity to overcome this deficiency.

¹The Ontario Institute for Studies in Education Act, 1965, R.S.O., 1970, Chapter 319, Section 3, p. 133.

Now, a major function of the Institute is its program of graduate studies leading to the degrees of Doctor of Philosophy, Doctor of Education, Master of Arts, and Master of Education. The increase in total enrolment during the ten years of the Institute's existence is shown in Table 16. The enrolment of full-time students in 1975-76 was 571, or more than five times that in 1965-66. The increase in the number of part-time students taking courses after-hours and on Saturdays was from 326 to 1,415, or more than four times during the ten-year period. The Summer Session enrolment increased from 489 to 1,337, or by almost three times.

The enrolment figures emphasize the fact that there is a tremendous demand for graduate work in education in Ontario. There is still an unmet need as indicated by the number of admissible candidates who have not been enrolled because of limitations in the number of staff. An independent study conducted by four outstanding educators has stated that "Given the evidence of increasing demand for graduate study opportunities, especially in the Toronto area, the Institute's aspirations for future growth seem modest."²

The distribution of full-time and part-time enrolments among the several departments of the Institute for the last four years is shown in Table 17 and Table 18 respectively. An examination of these statistics shows that the departments of study attracting the greatest numbers of students are applied psychology, curriculum, educational administration, history and philosophy, sociology in education, and special education. All of these areas are of special significance for students in educational programs in the various types of institutions throughout the province. The positive impact of the additional qualifications of teachers, vice-principals, supervisors, co-ordinators, and administrative personnel on the experiences of learners at all levels is bound to be substantial.

The cumulative totals of the number of students by departments who have graduated from the Institute during its ten years of existence are shown in Table 19. The distribution among the four degree programs are shown in Table 20 to 23 inclusive.

²Perspectives and Plans for Graduate Studies, 2. Education 1973, Advisory Committee on Academic Planning, Ontario Council on Graduate Studies, Toronto, 1973, p. A-39.

TABLE 16

ENROLMENTS, ACADEMIC YEARS

| | <u>1965-66</u> | <u>1966-67</u> | <u>1967-68</u> | <u>1968-69</u> | <u>1969-70</u> | <u>1970-71</u> | <u>1971-72</u> | <u>1972-73</u> | <u>1973-74</u> | <u>1974-75</u> | <u>1975-76</u> |
|--------------------------------|----------------|----------------|----------------|----------------|----------------|------------------|----------------|----------------|----------------|----------------|----------------|
| <u>1965-66 to 1975-76</u> | | | | | | | | | | | |
| Full-time students | 101 | 153 | 302 | 362 | 439 | 378 ^a | 441 | 461 | 503 | 534 | 571 |
| After-hours students | 326 | 586 | 744 | 723 | 856 | 986 | 1,192 | 1,262 | 1,476 | 1,458 | 1,415 |
| Part-time thesis students | 14 | 32 | 45 | 49 | 95 | 109 | 135 | 155 | 141 | 211 | 203 |
| Total | 441 | 771 | 1,091 | 1,134 | 1,390 | 1,473 | 1,768 | 1,878 | 2,120 | 2,203 | 2,189 |
| Summer ^{b, c} Session | 489 | 661 | 844 | 1,034 | 1,097 | 1,154 | 1,223 | 1,238 | 1,357 | 1,326 | 1,337 |

Notes: ^aThis figure for 1970-71 and subsequent years no longer includes daytime students on a reduced program; these are now included in the total for part-time students.

^bSummer session figures are for the summer preceding the academic year.

^cThere is an overlap of about 70 per cent between registrants in summer session and in the regular academic year.

TABLE 17

DISTRIBUTION OF FULL-TIME ENROLMENT BY DEPARTMENTS

1972-73 to 1975-76 INCLUSIVE^a

| Department | 1972-73 | 1973-74 | 1974-75 | 1975-76 |
|---------------------------------|----------------------------|----------------|----------------|----------------|
| Adult Education ^b | 44.5 (9.7) ^c | 45 (8.9) | 62 (11.6) | 72 (12.6) |
| Applied Psychology ^b | 129.5 (28.1) | 142 (28.2) | 157 (29.4) | 170 (29.8) |
| Certificate Studies | 7 (1.5) | 3 (0.6) | 4 (0.8) | - ^d |
| Computer Applications | 17 (3.7) | 15 (3.0) | 12 (2.3) | 10 (1.8) |
| Curriculum | 54 (11.7) | 56 (11.1) | 58 (10.9) | 70 (12.3) |
| Educational Administration | 34 (7.4) | 30 (6.0) | 39 (7.3) | 39 (6.8) |
| Educational Planning | 21 (4.6) | 28 (5.6) | 28 (5.2) | 24 (4.2) |
| Higher Education | 7 (1.5) | 8 (1.6) | 8 (1.5) | 7 (1.2) |
| History and Philosophy | 46 (10.0) | 56 (11.1) | 52 (9.7) | 54 (9.5) |
| Measurement and Evaluation | 25 (5.4) | 24 (4.8) | 20 (3.7) | 18 (3.2) |
| Sociology in Education | 36 (7.8) | 49 (9.7) | 50 (9.4) | 61 (10.7) |
| Special Education | 28 (6.1) | 36 (7.2) | 36 (6.7) | 38 (6.7) |
| Interdepartmental | 12 (2.6) | 11 (2.2) | 8 (1.5) | 8 (1.4) |
| Other | 0 (0.0) | 0 (0.0) | 0 (0.0) | 0 (0.0) |
| All Departments | 461 (100.0) | 503 (100.0) | 534 (100.0) | 571 (100.0) |

Notes: ^aEnrolment figures for all years are as of December 1.

^bIncludes one-half the total enrolment (13 in 1972-73, 14 in 1973-74, 19 in 1974-75 and 6 in 1975-76) in the Adult Education and Counseling Program offered jointly by the Departments of Adult Education and Applied Psychology.

^cEntries in brackets show the distribution in percentages.

^dCertificate Students reported in departmental figures for 1975-76.

Source: Enrolment Report, Academic year 1975-76, (Mimeographed), The Ontario Institute for Studies in Education, Toronto, January 30, 1976.

TABLE 18

DISTRIBUTION OF PART-TIME ENROLMENT BY DEPARTMENTS
1972-73 to 1975-76 INCLUSIVE^a

| <u>Department</u> | <u>1972-73</u> | <u>1973-74</u> | <u>1974-75</u> | <u>1975-76</u> |
|---------------------------------|---------------------------|------------------|------------------|------------------|
| Adult Education ^b | 119 (9.4) ^c | 107 (7.2) | 133 (9.1) | 162 (11.4) |
| Applied Psychology ^b | 128 (10.1) | 161 (10.9) | 196 (13.4) | 202 (14.3) |
| Certificate Studies | 21 (1.7) | 25 (1.7) | 22 (1.5) | — ^d |
| Computer Applications | 24 (1.9) | 32 (2.2) | 36 (2.5) | 18 (1.3) |
| Curriculum | 297 (23.5) | 313 (21.2) | 270 (18.5) | 260 (18.4) |
| Educational Administration | 183 (14.5) | 272 (18.4) | 254 (17.4) | 238 (16.8) |
| Educational Planning | 35 (2.8) | 37 (2.5) | 22 (1.5) | 30 (2.1) |
| Higher Education | 5 (0.4) | 3 (0.2) | 5 (0.4) | 2 (0.1) |
| History and Philosophy | 136 (10.8) | 137 (9.3) | 137 (9.4) | 147 (10.4) |
| Measurement and Evaluation | 22 (1.7) | 36 (2.4) | 32 (2.2) | 34 (2.4) |
| Sociology in Education | 86 (6.8) | 128 (8.7) | 143 (9.8) | 122 (8.6) |
| Special Education | 158 (12.5) | 165 (11.2) | 168 (11.5) | 156 (11.0) |
| Interdepartmental | 5 (0.4) | 0 (0.0) | 0 (0.0) | 0 (0.0) |
| Other | 43 (3.4) | 60 (4.1) | 40 (2.8) | 44 (3.1) |
| All Departments | 1,262 (100.0) | 1,476 (100.0) | 1,458 (100.0) | 1,415 (100.0) |

^aEnrolment figures for all years are as of December 1. In addition, 125, 111, 168, and 165 students were registered for 2nd term only in 1972-73, 1973-74, 1974-75, and 1975-76 respectively.

^bIncludes one-half the total enrolment (40 in 1972-73, 34 in 1973-74, 30 in 1974-75, and 29 in 1975-76) in the Adult Education and Counseling program offered jointly by the Departments of Adult Education and Applied Psychology.

^cEntries in brackets show the distribution in percentages.

^dCertificate Students included in Departments of Adult Education and Educational Administration for 1975-76.

Source: Enrolment Report, Academic year 1975-76, (Mimeographed), The Ontario Institute for Studies in Education, Toronto, January 30, 1976.

TABLE 19
GRADUATES OF O.I.S.E.
1965-66 to February, 1976

| <u>Department</u> | <u>Doctor of Philosophy</u> | <u>Doctor of Education</u> | <u>Master of Arts</u> | <u>Master of Education</u> | <u>Totals</u> |
|------------------------|---------------------------------|--------------------------------|---------------------------|--------------------------------|---------------|
| Adult | | | | | |
| Education | 13 | 7 | 28 | 213 ^a | 261 |
| Applied | | | | | |
| Psychology | 67 | 10 | 149 | 853 ^a | 1,079 |
| Computer | | | | | |
| Applications | 5 | | 19 | 44 | 68 |
| Curriculum | | | | | |
| | 32 | 8 | 34 | 646 | 720 |
| Educational | | | | | |
| Administration | 25 | 7 | 28 | 902 | 962 |
| Educational | | | | | |
| Planning | 11 | 1 | 9 | 63 | 84 |
| Higher | | | | | |
| Education | 4 | 3 | 1 | 3 | 11 |
| History and | | | | | |
| Philosophy | 14 | 14 | 35 | 180 | 243 |
| Measurement and | | | | | |
| Evaluation | 23 | 1 | 23 | 65 | 112 |
| Sociology in | | | | | |
| Education | 11 | 1 | 40 | 107 | 159 |
| Special | | | | | |
| Education | 5 | 4 | 20 | 250 | 279 |
| Interdepart- mental | 5 | | 5 | 28 | 38 |
| Unclassified | | | | 345 | 345 |
| Total | 215 | 56 | 391 | 3,699 | 4,361 |

Note: ^a Twenty students in Adult Education and Counselling are counted in Applied Psychology only.

TABLE 20

GRADUATES WITH DOCTOR OF PHILOSOPHY DEGREE

| Department | 1965-66 to February, 1976 | | | | | | | | | | | Totals |
|----------------------------|---------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------|
| | 65-66 | 66-67 | 67-68 | 68-69 | 69-70 | 70-71 | 71-72 | 72-73 | 73-74 | 74-75 | 75-76 | |
| Adult Education | | | | | 1 | 1 | 2 | 2 | 3 | 3 | 1 | 13 |
| Applied Psychology | | | 2 | 5 | 6 | 6 | 2 | 11 | 12 | 9 | 14 | 67 |
| Computer Applications | | | | | | | | 4 | 1 | | | 5 |
| Curriculum | | | | | | | | | | | | |
| Educational Administration | | 1 | | 1 | 3 | 3 | 5 | 7 | 5 | 5 | 3 | 32 |
| Educational Planning | | | | | 1 | 4 | 8 | 1 | 3 | 3 | 4 | 25 |
| Higher Education | | | | | | | 3 | 1 | 4 | 3 | | 11 |
| History and Philosophy | | | | | | | | 2 | 1 | 1 | | 4 |
| Measurement and Evaluation | | | | | | 2 | 2 | | 2 | 3 | 5 | 14 |
| Sociology in Education | | | | 3 | 4 | | 3 | 2 | 2 | 4 | 5 | 23 |
| Special Education | | | | | | | 1 | 4 | 2 | 1 | 3 | 11 |
| Interdepartmental | | | | | | | 1 | | 1 | 2 | 1 | 5 |
| Total | 1 | 2 | 2 | 9 | 15 | 16 | 27 | 35 | 36 | 36 | 38 | 215 |

Source: O.I.S.E., Graduates to Date, (Mimeographed), The Ontario Institute for Studies in Education, Toronto, March 10, 1976, p. 2.

GRADUATES WITH DOCTOR OF EDUCATION DEGREE

1965-66 to February, 1976

| Department | 65-66 | 66-67 | 67-68 | 68-69 | 69-70 | 70-71 | 71-72 | 72-73 | 73-74 | 74-75 | 75-76 | Total |
|----------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Adult Education | 1 | | | 2 | | 1 | 1 | 1 | | | 1 | 7 |
| Applied Psychology | 2 | | 3 | 1 | 1 | 1 | 1 | | | | 1 | 10 |
| Computer Applications Curriculum | | | | | | | | | | | | |
| Educational Administration | | | 3 | 1 | 1 | 1 | 2 | | | | | 8 |
| Educational Planning | 1 | | 1 | 1 | | 1 | | | 1 | | 2 | 7 |
| Higher Education | | | | | | | | | | | | 1 |
| History and Philosophy | | | | | 1 | | 1 | | | | 1 | 3 |
| Measurement and Evaluation | 3 | | | 1 | 5 | 1 | 1 | | 1 | | 2 | 14 |
| Sociology in Education | 1 | | | | | | | | | | | 1 |
| Special Education | | | | | | | | 1 | | | | 1 |
| Interdepartmental | 1 | | 2 | 1 | | | | | | | | 4 |
| Total | 1 | 8 | 9 | 8 | 8 | 5 | 6 | 2 | 2 | 2 | 7 | 56 |

Source: O.I.S.E., Graduates to Date, (Mimeographed), The Ontario Institute for Studies in Education, Toronto, March 10, 1976, p. 2.

TABLE 22

GRADUATES WITH MASTER OF ARTS DEGREE

| Department | 1965-66 to February, 1976 | | | | | | | | | | | Totals |
|----------------------------|---------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------|
| | 65-66 | 66-67 | 67-68 | 68-69 | 69-70 | 70-71 | 71-72 | 72-73 | 73-74 | 74-75 | 75-76 | |
| Adult Education | 1 | | | 4 | 1 | 4 | 3 | 3 | 3 | 4 | 5 | 28 |
| Applied Psychology | | 1 | 3 | 10 | 14 | 15 | 27 | 21 | 17 | 29 | 12 | 149 |
| Computer Applications | | | | 3 | 1 | 4 | 3 | | 1 | 2 | 5 | 19 |
| Curriculum | | | 2 | 1 | 5 | 3 | 3 | 7 | 4 | 6 | 3 | 34 |
| Educational Administration | | | | 7 | 4 | 4 | 2 | 6 | 5 | | | 28 |
| Educational Planning | | | | 1 | 1 | 1 | | 2 | 1 | 2 | 1 | 9 |
| Higher Education | | | | | | | | | | | 1 | 1 |
| History and Philosophy | | 1 | 3 | | 4 | 7 | 4 | 4 | 1 | 6 | 5 | 35 |
| Measurement and Evaluation | | | 2 | | | 4 | | 10 | 3 | 3 | 1 | 23 |
| Sociology in Education | | | 1 | | 3 | 6 | 4 | 10 | 5 | 7 | 4 | 40 |
| Special Education | | | | | | 3 | 3 | 7 | 5 | 2 | | 20 |
| Interdepartmental | | | | | | | 1 | 3 | | 1 | | 5 |
| Total | 1 | 2 | 11 | 26 | 33 | 51 | 50 | 73 | 45 | 62 | 37 | 391 |

Source: O.I.S.E., Graduates to Date, (Mimeographed), The Ontario Institute for Studies in Education, Toronto, March 10, 1976, p.2.

TABLE 23

GRADUATES WITH MASTER OF EDUCATION DEGREE
1965-66 to February, 1976

| Department | 65-66 | 66-67 | 67-68 | 68-69 | 60-70 | 70-71 | 71-72 | 72-73 | 73-74 | 74-75 | 75-76 | Totals |
|----------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-----------------|-----------------|-----------------|--------|
| Adult Education | | | 13 | 20 | 27 | 44 | | 27 | 33 ^a | 35 ^a | 14 | 213 |
| Applied Psychology | | | 64 | 103 | 102 | 110 | 162 | 114 | 86 ^a | 97 ^a | 15 ^a | 853 |
| Computer Applications | | | | | 2 | 1 | 3 | 15 | 10 | 12 | 1 | 44 |
| Curriculum | | | | | | | | | | | | |
| Educational Administration | | | 28 | 43 | 56 | 71 | 73 | 99 | 107 | 149 | 20 | 646 |
| Educational Planning | | | 91 | 116 | 145 | 104 | 98 | 87 | 108 | 133 | 20 | 902 |
| Higher Education | | | 1 | 3 | 2 | 5 | 5 | 13 | 14 | 15 | 5 | 63 |
| History and Philosophy | | | | | | | | 1 | 2 | | | 3 |
| Measurement and Evaluation | | | 8 | 12 | 7 | 9 | 16 | 33 | 42 | 46 | 7 | 180 |
| Sociology in Education | | | 10 | 9 | 6 | 8 | 4 | 6 | 6 | 14 | 2 | 65 |
| Special Education | | | 1 | 2 | 5 | 1 | 15 | 17 | 18 | 42 | 6 | 107 |
| Interdepartmental | | | 2 | 10 | 30 | 17 | 28 | 36 | 56 | 67 | 4 | 250 |
| Unclassified | 165 | 180 | 4 | 7 | 1 | 3 | 2 | 7 | 3 | 1 | | 28 |
| Total | 165 | 180 | 222 | 325 | 383 | 373 | 406 | 455 | 485 | 611 | 94 | 3,699 |

Note: ^aStudents in Adult Education and Counseling counted in Applied Psychology only.
Source: O.I.S.E., Graduates to Date, (Mimeographed), The Ontario Institute for Studies in Education, Toronto, March 10, 1976, p. 2.

As a further service to teachers and other educators in various parts of the province, the Institute has established off-campus graduate courses. Among the centres where staff of O.I.S.E., have gone to teach are Windsor, Kitchener-Waterloo, Barrie-Orillia, Peterborough, North Bay-Sudbury and Timmins. As a result of these programs and courses it has been possible for students to pursue graduate work which would otherwise have been impossible for them.

The Institute has made considerable progress since its early days. Undoubtedly, in the period immediately following 1965, too much was attempted in too short a time. The initial "growing pains" have been overcome and steady growth and accomplishment have characterized the last five years. In the Report to which reference was made earlier, the following statement occurs:

"OISE has firmly established itself as the leader in graduate studies in education in Ontario. In our judgment it must, for the foreseeable future, be regarded as the pace-setter in the field."³

While the enrolment has increased phenomenally during the first decade of the Institute's operations, the potential for continued growth is substantial. The optimum number of students will increase for several reasons, among which are the following:

1. All entrants (except those in some vocational areas) to the teaching profession after 1973 have been required to have a basic degree before certification. Previously, many teachers devoted several years to academic work towards the first degree. In the future many of the new entrants to the profession will be qualified to do graduate work in education earlier in their careers.
2. Since all new entrants to the profession will already have had experience as full-time university students, they will be more inclined to continue university work in education at the graduate level either part-time or, in a fewer number of cases, full-time.

³Perspective and Plans for Graduate Studies, op. cit., p. A-39.

3. More teachers will recognize the need for further professional work in order to exceed the minimum qualification represented by the basic degree and one year of professional study for certification.
4. With enrolment in the elementary schools already declining and with the prospect of a similar decline in the secondary schools after 1977, the competition among teachers for promotion will be greater. Further professional work will enhance the possibility of advancement.
5. The complexity of the educational enterprise in modern society, the findings of research, the demands for quality education, and other problems confronting educators will work to influence teachers, supervisors, and administrators of the necessity for advanced work if they are to fulfil their roles adequately.
6. The reduced demand for teachers for the balance of this decade and the graduation of many well-qualified new teachers will put pressure on those who already hold positions to increase their professional competence.

Admission Requirements to Graduate Studies

The potential for increased graduate student enrolment is even greater if certain existing difficulties can be overcome. For example, at the present time an applicant for admission to graduate work at the Master's level, even though he holds a Bachelor's degree, is required to have a certain minimum average on the final five courses of his undergraduate program. Any student who holds a degree with less than this average is required to take additional undergraduate courses in disciplines other than education to improve his "average" as a means of demonstrating that he is capable of doing graduate work in education. The validity of this assumption is highly questionable. Since the Bachelor's degree or its equivalent provides adequate academic background for teaching at the elementary or secondary levels, it does not seem the best use of the student's time to have him postpone his further professional preparation while he meets an "artificial" hurdle.

The necessity for an applicant who holds a degree but who does not meet the present admission requirement has several consequences for the educational system as well as the individual applicant. If the applicant takes further undergraduate courses to improve his average to the required percentage or grade, he delays his graduate work in education. He is, therefore, prevented from pursuing his professional interest and, as a result, the pupils whom he teaches do not receive the benefit which would result from incorporation into his practice of learnings and skills acquired in graduate professional courses. The applicant may decide not to take additional undergraduate courses but to apply to another institution that is willing to accept his standing on his Bachelor's degree as satisfactory for admission to its graduate program in education. The result has been that many Ontario teachers are attending graduate education schools across the border in United States or that they have encouraged American institutions to set up programs for them in Ontario. In either case teachers in our schools are receiving instruction based on American experience and research often unrelated to the schools in which they work. A third possibility is that the applicant may decide not to pursue graduate studies at all but to continue to practice his profession for the remainder of his career within the limitations of his initial professional qualification. In this instance his students will not receive the benefits that might come to them if their teacher were allowed to pursue a program of graduate studies.

In so far as the Institute is concerned, it is also a loser in terms of one of its major objectives. As a direct disseminator of the findings of research, the Institute must rely to a considerable extent on its graduate students. Each graduate student attends the Institute as an individual and not as a representative of his school system. Through its work with these graduate students, the Institute has an ideal opportunity to promulgate the results of research. With over 2,000 persons in attendance at courses at the graduate level, the possibility for disseminating new ideas is substantial. It is through its graduates that the real opportunity to influence the schools in a positive way exists. If the number of graduate students can be increased by removal of artificial barriers to the admission of applicants, the potential for dissemination of new ideas, skills, and practices will be substantially increased.

Research and Development

Essential to the quality of instruction in graduate studies is the research in which staff members are engaged. Without the component of research activities to generate new knowledge, to discover new techniques, and to point the way to new directions, graduate teaching must ultimately become pedestrian and uninspiring. At O.I.S.E., research and development have three major aims: to discover more about how both children and adults learn, to develop methods and materials to assist their learning, and to evaluate the effectiveness of new programs developed at O.I.S.E., and elsewhere.

There is an extensive program of research and development carried on at the Institute. In 1975-76, there are some 180 projects under way. Typical of these activities are the work in Basic Skills in Mathematics, Pupil Achievement in Basic Skills, Elementary School Thinking Program, Moral Education, French Language Instruction, Bilingual Education, Franco-Ontarian Education, Studies in the Credit System, Volunteer Assistance Project, Leadership in Educational Administration, and Computer-Assisted Instruction in the Colleges of Applied Arts and Technology. Perusal of these titles indicates that all of them deal with areas of interest and concern to the general public and to the profession in Ontario. Most of them reflect the unique characteristics of education in the province and are designed to improve instruction and administration of programs of significance for students in our schools. Other research is described in greater detail in the annual reports of the Institute.^{4,5,6} This body of research in education is unmatched in Canada and compares favourably with the best in any other jurisdiction.

⁴Annual Report of the Board of Governors, The Ontario Institute for Studies in Education, 1972-73, O.I.S.E., Toronto, 1974, pp. 16-35.

⁵Annual Report of the Board of Governors, The Ontario Institute for Studies in Education, 1973-74, O.I.S.E., Toronto, 1975, pp. 14-24.

⁶Annual Report of the Board of Governors, The Ontario Institute for Studies in Education, 1974-75, O.I.S.E., Toronto, 1976, pp. 11-21.

Field Development

The third major area of the Institute's work is field development. Since its inception the Institute has been committed to the conduct of research in school systems; to assistance to teachers, supervisors, administrators, parents, and trustees in the implementation of ideas and programs which they have accepted; and to the widespread dissemination of the findings of research. Present programs in these areas are the most extensive in any jurisdiction in Canada.

The chief mechanism for the conduct of the Institute's activities in field development is the Field Centre in each of nine geographic areas. Each Field Centre is staffed by a head and a project director, plus one or more supporting personnel, the number depending on local needs and the resources available. The job functions of the centres are determined largely by the particular needs of the region each serves, by the local geography, and by the expertise of staff members. Field Centres are located as follows:

Western Ontario Centre (London)
Niagara Centre (St. Catharines)
Trent Valley Centre (Peterborough)
Northwestern Centre (Thunder Bay)
Midnorthern Centre (Sudbury)
Midwestern Centre (Kitchener)
Ottawa Valley Centre (Ottawa)
Northeastern Centre (North Bay)
Central Ontario Centre (Toronto)

The nine Centres are working with thousands of teachers and administrators throughout the province, assisting them to solve local problems of education. The Institute helps these educators to engage in research in their own jurisdictions, to develop new curriculum materials, and to conduct workshops dealing with topics of concern to them. As a result, local educational authorities have a valuable resource which enables them to assume responsibilities delegated to them in a decentralized system. A description of the work of a typical Field Centre is contained in the Report⁷ of

⁷ Annual Report, Niagara Centre, 1974-1975, The Ontario Institute for Studies in Education, 187 Geneva Street, St. Catharines, Ontario, 1975.

the Niagara Centre for 1974-1975.

To the extent that the Institute has acceptance of its activities by the general public, much of the credit must go to the Institute's Field Centres. The staff members in each of the nine Centres have direct and continuing communication with the Regional offices of the Ministry of Education, with school systems, and with individual schools. Involvement at the local level provides an opportunity to make known the research studies being carried on in the schools and to publicize some of the work being done by the Institute at its central location. It is imperative that the opportunities provided by the Field Centres be recognized and supported as of major significance for the future of the Institute and for the improvement of programs in the schools of the province.

While the Field Centres have an important role in the dissemination and implementation of research findings, it is not the function of the Institute to decide the research that will be incorporated into the practice of school systems or schools. It is the Ministry of Education, through The Education Act, 1974, and the Regulations, that has a leadership role in the formulation of the broad purposes of the educational enterprise. Its function is to identify the direction of the total system in a way that reflects international, national and provincial goals, and curriculum guidelines issued by the Ministry should be an expression of that function. It is the representatives of the school system, the trustees, acting on the wishes of the community and advised by the system's professional staff, that are responsible for determining the goals and objectives of the local school system. Within this framework, it is the staff of the individual school that must make the adaptations necessary to take into account local circumstances and conditions. The lines of authority and responsibility are, therefore, rather clearly defined. The Institute must accept the fact that it cannot decide the direction in which the educational program will proceed.

There is nonetheless a highly significant and important role for the Institute to play. It can provide professional knowledge and expertise to assist school systems and schools to work towards the attainment of goals that they have identified and adopted. For example, several school

systems in Ontario have in recent years introduced the alternate full-day kindergarten in rural areas as an alternative to the more traditional half-day every-day pattern. The purpose is to save money on transportation costs by avoiding having to take one group of pupils home at the completion of the half-day at noon-hour and pick up a second group for the afternoon session. It is quite possible that the teacher will adapt the program for the full-day pupils to take into account the possibility of fatigue, strain, etc. In this activity, the teacher may well seek the advice and help of her principal, school staff, supervisors, or program consultants.

The school or the school system may wish to know, however, whether financial savings realized by avoidance of noon-hour transportation are offset by some losses in the attainment of desirable educational goals and objectives because young pupils are too tired in the afternoon to benefit properly from the educational program. In this case, if answers are to be found to the questions raised, it may be necessary to set up a rather sophisticated research project using experimental and controlled groups, and taking cognizance of such factors as age of individual pupils, general aptitude, assessment of growth in relation to goals and objectives, distance travelled each day, length of time on the bus, and the like. If such a study is to have validity and acceptability, it is essential that the project design be worked out by those who know experimental procedures and practices and that they be involved deeply in the activity. It is in this area that the Field Centres can bring to bear the special expertise of the staff of a Field Centre. In the process, the teacher, the school staff, and supervisory staff can become more knowledgeable in these areas and enhance their professional competence. The staff of the Field Centres are in a position to identify and to involve professors and other researchers from the central office of the Institute where their knowledge, skills and expertise can be helpful.

If the Institute continues to accept and involve itself in the role illustrated by the example outlined above, it will have an opportunity to perform a highly useful and essential function, it will continue to be recognized as an agency concerned with the real problems of teachers, supervisors, administrators, and the general public; it will be able to

disseminate knowledge and research findings associated with or related to the projects in which it is involved; and it will, as a result, have a positive impact on the quality of education. While progress has been substantial, there is still a tremendous potential for improvement in education in Ontario through the activities of the Field Centres operating in the manner described.

There are several other ways in which the Institute through its Field Centres can assist school systems and schools to achieve their goals and objectives while, at the same time, furthering the Institute's desires to disseminate and to see implemented the findings of experimentation and research. For example, the Field Centres can complement and enhance the work of the staff of the Regional Offices of the Ministry of Education. Program consultants in the Regional Offices are available to provide professional help to school systems. Their services can be requested to assist teachers, principals, co-ordinators, and supervisory officers in the pursuit of objectives that they have identified. For many situations they probably possess the ability, knowledge and expertise to assist in the solution of problems faced by local authorities. But they cannot be expected to be highly knowledgeable and competent in all areas represented in the educational spectrum. For example, if a school system embarks on a program to prepare its principals for the role of educational leader in the communities in which their schools are located, it may well be that professional resources beyond those represented by program consultants will be required. It is here that the representatives in the Field Centres can complement and supplement the efforts of the school system and the Regional Office in the design of an in-service program, in the identification of materials and resources, in the determination of methods and procedures for the program, and by participation in seminars, workshops, and other activities where the special competencies that they have can be utilized to good advantage.

It is of greatest importance that the staff of the Field Centres work in close cooperation with personnel in the Regional Offices. To a considerable extent the Field Centres should see themselves as an extension of the resources represented in the Regional Offices. Under no circumstances should the Field Centres be seen by local school systems to be in competi-

tion with the Regional Offices. Otherwise, the two groups may work at cross-purposes, cause confusion, and reflect adversely on the work of both organizations. There is considerable evidence that the Regional Offices of the Ministry and the Field Centres of the Institute have developed a *modus operandi* that is working to the mutual advantage of the school systems with which they are associated.

O.I.S.E. Library

The main library at the Institute is the most extensive specialized library in education in Canada. Its more than 350,000 holdings include a wide range of current periodical titles, specialized resources represented by the Instructional Materials Centre containing many examples of English-language and French-language curriculum materials, and reference resources on almost any educational topic.

The library provides information services to meet the needs of educators across the province. In 1974-75, these services included the production of scores of special-purpose bibliographies, the answering of almost 4,000 requests for information, and the provision of books to some 2,600 borrowers from outside the Institute. The educational community served includes teachers, consultants, principals, supervisory officers, administrators, in the elementary and secondary schools and personnel in other parts of the educational system, including universities, colleges, independent and private schools, and pre-school centres.

The Institute cooperates with other libraries through the inter-library loan. It receives requests for more than three times the number of books it borrows and responds to several thousand such requests annually. The Institute is the only library in the province that holds a complete collection of text-books representative of the province's educational history and as a result is called on to answer enquiries from many sources.

Financing the Institute

Since its beginning in 1965, the Institute has relied heavily on annual grants from the Government of Ontario. The revenues from this source are

shown in Table 24. In its first year of operation, funding was from the Consolidated Revenue Fund of the province in the amount of \$1,686,935. Of this sum \$1,039,891 was applied to the Institute's fiscal year 1965-66, ended June 30, 1966. The remainder of \$647,044 was applied to the Institute's fiscal year 1966-67. All grants from government were received through the Department of Education until 1971-72, when each of the Ministry of Education and the Ministry of Colleges and Universities began to pay part of the grant depending on the area of responsibility for each Ministry.

(a) Graduate Studies

From the date of its establishment to 1971-72, the Institute received its grant to support graduate studies as part of a block grant for its total operations. During the period, the universities were placed on formula financing based on a Basic Income Unit with weightings per student to take into account more costly programs and more advanced studies. The Institute was unique in that its work was wholly at the graduate level, it was a new institution, and it was the only one of its kind in Ontario. There was, therefore, some justification in its early years for the Department of Education to treat it apart from the universities.

Beginning in 1971-72, however, the amount of grants to the Institute for graduate studies was calculated in accordance with the formula applicable to the universities. Payment of grants for this purpose was transferred from the then Department of Education to the then Department of Colleges and Universities. These changes introduced a degree of stability to the anticipated revenues of the Institute for graduate studies, even though the amount of anticipated income may not have been as great as formerly. In any case, the financial problems associated with the early years of the development of a graduate school had been met and there was no longer any justification for revenues in excess of those provided by formula financing.

The continuing substantial increase in enrolment at the Institute gave promise of stability of financing and increased revenues as a result of application of formula financing by the province. However,

TABLE 24

THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATION

GRANTS FROM PROVINCE OF ONTARIO

FOR THE FISCAL YEAR ENDED JUNE 30^a

| | <u>1974-75</u> | <u>1973-74</u> | <u>1972-73^a</u> | <u>1971-72</u> | <u>1970-71</u> |
|--|----------------|----------------|----------------------------|----------------|----------------|
| Ministry of Education | \$2,356,000 | \$2,997,833 | \$2,997,500 | \$4,496,000 | \$9,540,000 |
| Ministry of Colleges and Universities | 6,106,000 | 5,402,653 | 4,333,177 | 4,270,760 | |
| Building Occupancy | 2,151,000 | 2,141,173 | 1,784,374 | 2,196,000 | 2,195,861 |
| Other | 860,000 | 617,575 | 557,817 | 887,749 | |
| Total | \$11,473,000 | \$11,159,234 | \$9,672,868 | \$11,850,509 | \$11,735,861 |
| | <u>1969-70</u> | <u>1968-69</u> | <u>1967-68</u> | <u>1966-67</u> | <u>1965-66</u> |
| Ministry of Education | \$10,048,000 | \$9,120,000 | \$7,277,855 | \$3,377,000 | \$1,039,891 |
| | 404,999 | 369,291 | 432,434 | 440,000 | |
| | | | | 308,994 | |
| | | | | 647,044 | |

| | | | | | |
|-------|--------------|-------------|-------------|-------------|-------------|
| Total | \$10,452,999 | \$9,489,291 | \$7,710,289 | \$4,773,038 | \$1,039,891 |
|-------|--------------|-------------|-------------|-------------|-------------|

Note: ^a Fiscal year was changed to end April 30.

Source: Annual Reports of the Board of Governors.

because the universities in Ontario experienced an overall reduction in the rate of increase in enrolment and because some universities had little or no increase in enrolment, the government in 1972-73 introduced the "slip-year" concept in its financing of universities. This action assisted most of the universities but it worked to the disadvantage of the Institute with its continuing rapid increase in enrolment. A second negative factor, in so far as the Institute is concerned, is abandonment by the government of formula financing for 1976-77, 1977-78, and possibly longer, in favour of increased grants geared to inflation. The potential for increased enrolment of graduate students at the Institute will probably not be realized because of the lack of funds to provide the necessary resources in personnel. There will, however, continue to be pressure on the Institute to increase enrolments so that admission offices will be faced with the necessity to turn away an increasing number of qualified applicants. Undoubtedly, those responsible for the recommendation to suspend formula financing were aware of this difficulty. However, since few, if any, universities could anticipate rapidly increasing enrolments from this point on, the adverse financial impact on them is negligible or non-existent. In the case of the Institute, the opposite is true. This result highlights the problems that arise in the application of a uniform policy to institutions that vary greatly in the nature of their programs, in their student body, and in their relationship to the society. There would seem to be some justification for renewed recognition of the unique characteristics of the Institute and the considerable impact it can make to the betterment of the quality of education offered in the schools through the preparation of highly-qualified teachers and other personnel pursuing graduate studies.

(b) Research and Development

The research and development component of the Institute's program is the essential element of its total operations. Both Graduate Studies and the Field Centres depend on the research and development areas for new knowledge and ideas. Graduate Studies requires staff who are engaged in research and development as the indispensable concomitant of

a wide range of programs at the Master's and Doctoral levels.⁸ Field Centres must work in the research and development areas with the school systems with which they interact if acceptable solutions to educational problems at the local level are to be based on authentic data and information.

While the Institute encountered some early difficulties in the development of its research activities, there is little doubt that these have been overcome and that the potential for improvement of the educational system is great. The Report that dealt with this aspect of the Institute's work had this comment:

"There can be no doubt that the Institute has established itself as a pace-setter in educational research and development in Canada and has acquired a world-wide reputation. On all the criteria of faculty experience that we have employed - qualifications, range of university experience in Canada and abroad, numbers of higher degrees supervised and graduate courses taught, book and journal publications - the staff of the Institute display exceptional strength."⁸

Under existing financial arrangements for the conduct and support of research and development, it is impossible for the Institute to plan with any degree of certainty for the provision of a strong and viable operation. In its early years, the Institute probably had a surfeit of financial resources beyond its capabilities to use all of them to best advantage. However, in 1970-71, the then Department of Education adopted a policy whereby it reduced the amount of its block grant to the Institute by 20 per cent a year for each of three years. The block grant is to fund the activities of the Institute in the areas of research and development and the Field Centres. The amount of the grants for these purposes is shown in Table 25.

The magnitude of the reductions have had a severe impact on the research capability even though staff members and the institution itself have recovered some of the lost revenue in competition with others for contract research funded by the Ministry of Education.

⁸Perspectives and Plans for Graduate Studies, op. cit., p. A-39.

TABLE 25

BLOCK GRANT FROM MINISTRY OF EDUCATION

1970-71 to 1974-75 INCLUSIVE

| <u>Year</u> | <u>Per Cent Reduction</u> | <u>Reduction</u> | <u>Calculated Block Grant</u> | <u>Amount of Block Grant</u> |
|-------------|-----------------------------------|------------------|-------------------------------|------------------------------|
| 1970-71 | | | \$5,620,000 | \$5,620,000 |
| 1971-72 | 20% of \$5,620,000 = | \$1,124,000 | 4,496,000 | 4,496,000 |
| 1972-73 | 20% of 4,496,000 = 10 months = | 899,200 | 3,596,800 2,997,333 | 2,997,500 |
| 1973-74 | 20% of 4,496,000 = 2 months = | 899,200 | 3,596,800 599,466 | 2,997,833 |
| | 20% of 2,997,500 = | 599,500 | 2,398,000 | |
| 1974-75 | 20% of 2,977,833 = | 599,566 | 2,398,267 | 2,356,000 |

When the block grant to the Institute was reduced, the Department of Education allocated part of the reduction to a special fund for research projects. Applications for grants from this fund could be made by any qualified staff member of an Ontario university who wished to pursue research in education. Awards have been made as a result of recommendations of an advisory group. Because staff members of the Institute have been successful in the competition for grants for their projects, the Institute has been able to recover each year part of the reduction to its block grant. A third possible source of some additional funds for research is from the money allocated by the province for contract research. These funds are dispensed for studies in which the Ministry of Education has a special interest and for which it is prepared to pay.

There are a number of uncertainties in the present methods of funding educational research that prevent sound planning and the best use of available resources. For example, because most research funds are committed annually, there is no assurance of the availability of money beyond the current year. It is, therefore, not possible to make commitments beyond that year. As a result, short-term projects receive priority, whereas important areas to be investigated often depend on longer-term studies. The uncertainties of funding make it difficult

or impossible to assure staff that there is any permanence to their employment or that funds will be available for continued research on which their scholarly reputations depend.

Without detracting from the desirability of making applications for approval of certain research projects to a central agency of the Ministry of Education, there are real problems for the Institute in this method. Other institutions in Ontario and members of their staffs are not as dependent on favourable verdicts for their research applications, because financial resources derived from this program constitute such a small part of their total receipts. However, in the case of the Institute, which is engaged in educational research as a first, major and only priority, the availability of funds allocated to specific research projects by an outside agency can be crucial to its continued operation.

During the last two years the Institute has been successful in expanding the sources of research funds.⁹ A wide variety of studies have been undertaken for the Canada Council, departments of the Federal government, foundations, school boards, and international agencies. Reliance cannot, however, be placed on these bodies for the maintenance of a viable research organization. Funding of projects from these sources is likely to be of short-term duration and relatively minimal in amounts. Consequently, to be realistic, dependence for the continued operation of the research component of the Institute's activities must rest with the Ministry of Education.

There is adequate justification for the expenditure of funds to maintain a research component in the total educational enterprise of the province. Expenditures for the elementary and secondary schools alone in 1973 substantially exceeded two billion dollars and have increased in the two years since. Enrolment in 1973 was slightly in excess of 2,000,000 students. The average expenditure per pupil in 1973 was approximately \$1,000. In the Institute's fiscal year 1972-73, its block grant amounted to \$3,597,000 pro-rated for a ten-month period to

⁹ Annual Report of the Board of Governors, The Ontario Institute for Studies in Education, 1973-74, pp. 42-44.

\$2,997,500. At least one-third of this sum was earmarked for the operation of the Field Centres which left the Institute approximately \$2,400,000 for applied research in school systems in the whole of 1972-73. This amount represents .12 of one per cent of the expenditures of school boards in 1973. Expressed in a per pupil amount it is about \$1.20 per year. Given the questioning attitude of the public about the quality of present-day education and the need for factual data and information on which to base decisions for the future, the amount devoted to research seems small.

There seems little doubt that a better method of financing research in the Institute must be found. The objectives of such a method should be to give some assurance of continued financial support beyond the current year for research projects that require more than one year to complete. Many educational problems of the greatest magnitude cannot be investigated and reported on in less than two or three years. The tendency at the present time is to ignore these areas in favour of short-term projects which can be completed during the funding period of one fiscal year.

A second objective that will be achieved in part if the first objective is realized is the retention of highly-qualified research personnel. Unless this objective is realized a capability established over a period of years will gradually diminish or disappear. Later, when it is again considered essential to have a research organization to study education, it will be necessary to recreate it and to experience, once more, many of the difficulties encountered in the development of the present resource. These observations are made in the full knowledge that it is imperative that economies be effected wherever possible in government spending in general and in expenditures for education in particular. It seems to us, however, that decision-making to achieve economies must be based on the results of first-rate research and the evidence it produces. Such a procedure is necessary to ensure that sound planning and the establishment of priorities may result.

(c) Field Development

Table 26 lists the year of establishment of the Institute's Field Centres and the total budget allocation for field development for each fiscal year.

TABLE 26
FIELD CENTRES, YEAR OF ESTABLISHMENT,
AND BUDGET ALLOCATIONS
1969-70 to 1975-76

| <u>Fiscal Year</u> | <u>Field Centres</u> | <u>Total Budget Allocation for Field Development</u> |
|--------------------|---|--|
| 1969-70 | Niagara - St. Catharines Trent Valley - Peterborough Western Ontario - London | \$ 366,303 |
| 1970-71 | Northwestern - Thunder Bay Midnorthern - Sudbury | 475,030 |
| 1971-72 | Midwestern - Waterloo Ottawa Valley - Ottawa | 534,614 |
| 1972-73 | Northeastern - North Bay | 673,632 |
| 1973-74 | | 517,304 |
| 1974-75 | | 587,017 |
| 1975-76 | Central Ontario - Toronto | 629,575 |

Most of our comments about the impact of the uncertainties of funding of Research and Development at the Institute are also applicable to Field Development which includes the Field Centres. Both are funded in large part by the block grant from the Ministry of Education. It is not possible to provide for the necessary continuity for the Field Centres by budget allocations made on an annual basis without any assurance that funds will be available for a subsequent year or years.

(d) General

At the present time no clear understanding exists between the Institute and the Ministry of Education about the role of the Institute in research and development and field development. The legislation establishing the Institute states that the objects include the study of matters and problems relating to or affecting education and dissemina-

tion and implementation of the findings of educational studies. These general statements now require some elaboration of the means by which the objectives are to be achieved and the method by which funding is to be provided.

It is suggested that the Institute should define clearly the role it sees for itself in these fields and the means by which it sees that role being conducted. It should then enter into discussions with the Ministry of Education in an endeavour to secure agreement of a statement acceptable to both the Institute and the Ministry. Only when such an agreement exists will it be possible to avoid the problems inherent in financing the Institute on an *ad hoc* basis.

An essential step in any agreement should be the development of a formula by which grants will be made to the Institute. It is suggested that the formula principle might apply to the determination of the block grant for research and development and field development. One possibility that has some appeal is relating the grant to the number of pupils in the schools. Since the Ministry of Education has responsibility for the elementary and secondary schools, an amount per pupil enrolled could be applied. In addition, an allowance might be made for some students in education at other levels. Using the amount of the block grant in 1973-74, of \$2,997,833 the figure would be approximately \$1.50 per pupil for that year. A figure such as this could provide the basis for a formula that could be adjusted annually to take into account changes in enrolment, inflation, and other relevant factors.

The application of the formula would be clearly understandable to the public and would have the virtue from the Ministry's standpoint of providing an objective basis for the allocation of funds. It would also permit the Institute to plan its activities in the knowledge that the fluctuation in the amount of funds available would be within a relatively narrow range.

There is considerable evidence that in the short period of its existence the Institute has made a significant contribution to education in Ontario. The potential for the future is even greater if the

necessary resources are made available to ensure that continued progress is made. The cost in terms of the total investment in education in the province is small in relation to the benefits to be derived. In the provision of high quality education for children in our schools, it is our view that the Institute has an important role to play. The essential funding to permit it to make that contribution should be assured on a continuing basis.

CHAPTER 4

THE ONTARIO EDUCATIONAL COMMUNICATIONS AUTHORITY

Background

In 1965, the then Department of Education established within its Curriculum Branch a new organization under the name of the Educational Television Section. During the year, two series of programs, one of eighteen half-hour telecasts in mathematics for grade 7, and one of seventeen half-hour telecasts in physics for grade 13, were produced in cooperation with the CBC and television station CFTO-TV in Toronto. Later these programs were telecast through the facilities of the CBC, CFTO-TV, and all the private television stations in Ontario. In 1966, the Educational Television Section was raised to the status of the Educational Television Branch within the Department of Education. The number of programs was substantially increased during 1966-67. In October, 1966, the Department of Education, in a brief to the Board of Broadcast Governors, proposed that television channels be reserved and assigned for the telecasting of educational programs. In 1969, the Department of Education in conjunction with the Canadian Broadcasting Corporation made an application to the Canadian Radio-Television Commission for a new ultra-high frequency station in Toronto to be devoted solely to educational broadcasting.¹

Establishment of the Authority

The Ontario Educational Communications Authority was established by an Act of the Legislature passed in June, 1970. The objects of the Authority are

- "(a) to initiate, acquire, produce, distribute, exhibit or otherwise deal in programs and materials in the educational broadcasting and communications fields;
- (b) to engage in research in those fields of activity consistent with the objects of the Authority under clause a; and
- (c) to discharge such other duties relating to educational broadcasting and communications as the Board considers to be incidental or conducive to the attainment of the objects mentioned in clauses a and b."²

¹Report of the Minister of Education, Ontario, 1969, The Queen's Printer and Publisher, Toronto, 1970, p. 6.

²The Ontario Educational Communications Authority Act, R.S.O., 1970, Chapter 311, Section 3.

The Authority is administered by a board of directors of thirteen members. The members of the Authority, including the chairman, are appointed by the Lieutenant Governor in Council. Of the remaining twelve members, apart from the chairman, not fewer than three and not more than four were required to be members of the public service of Ontario. By an amendment to the Act³ in 1974, the provision regarding members of the public service was changed so that all members must now be non-public servants. The chairman of the board of directors is also the chief executive officer of the Authority.

Provision exists in the Act⁴ to permit the Authority to appoint such regional councils and such advisory committees as it considers necessary to advise it in developing the policy and operations of the Authority.

Channel 19

As far back as 1965, the province indicated its intention to establish a provincial educational communications system. In 1966, the then Department of Education applied to the Board of Broadcast Governors for a licence to operate a television station. This application was in conflict with a policy of the Federal government, enunciated in 1946, by which the granting of such licences to other governments or to corporations owned by other governments was prohibited.⁵ After protracted negotiations involving the Ontario Department of Education, the Department of the Secretary of State of the Federal government, the Council of Ministers of Education of Canada, the Board of Broadcast Governors, the Canadian Radio-Television Commission, and the Canadian Broadcasting Corporation arrangements were concluded in December, 1969, whereby authority to transmit educational television programs was granted. The agreement specified that at least one channel of a cable transmission facility should be set aside for the use of a provincial authority for educational broadcasting, or

³The Ontario Educational Communications Authority Amendment Act, 1974, Statutes of Ontario, 1974, Chapter 12, Section 1.

⁴The Ontario Educational Communications Authority Act, R.S.O., 1970, op. cit., Section 9.

⁵The Ontario Educational Communications Authority Annual Report/1970-1971, p. 9.

that the Canadian Broadcasting Corporation might provide a transmission facility for the use of a provincial authority for educational broadcasting. In either case, the types of programming to be transmitted were defined as follows:

- "1. programming designed to be presented in such a context as to provide a continuity of learning opportunity aimed at the acquisition or improvement of knowledge or the enlargement of understanding of members of the audience to whom such programming is directed and under circumstances such that the acquisition or improvement of such knowledge or the enlargement of such understanding is subject to supervision or assessment by the provincial authority by any appropriate means;
2. programming providing information on the available courses of instruction or involving the broadcasting of special educational events within the educational system."

A main concern of the Federal authorities was that a provincial broadcasting agency, as an arm of a provincial government, might intrude on the commercial broadcasting field or that it might broadcast programs not considered to be strictly within the area of educational television as, for example, political broadcasts in support of an existing provincial government. Under the arrangement whereby the provincial broadcasting agency would develop its educational programming and the Canadian Broadcasting Corporation would operate the transmitter, any program considered by the Canadian Broadcasting Commission to violate the definition of educational broadcasting could be kept off the air by shutting down the transmitter. In the light of subsequent events, there may have been an unnecessary concern on the part of the Federal authorities but the division of responsibility may have ensured that no problem would arise. In any case, in so far as we are aware, there has never been any program refused for transmission.

The initial agreement between the Ontario Educational Communications Authority and the Canadian Broadcasting Corporation provided for the installation of the CICA-TV (Channel 19) transmitter on the C.B.C., Jarvis Street tower. The Authority agreed to repay, with interest, the capital expenditures by the C.B.C., made necessary to provide the additional transmission facilities for Channel 19. The estimated cost was \$630,000. The Authority also agreed to pay an amount of approximately \$542,000 per

⁶Ibid, pp. 9-10.

annum for an initial period of ten years to reimburse the C.B.C., for operating costs of the transmitter.

Channel 19 began operation on September 27, 1970, and has continued to function since that time.

Extension of Educational Television Broadcasting

An objective of the Authority has been the extension of broadcasting to other parts of the province. A second station has been in operation for some time in Ottawa. Other transmitters are under construction or have been constructed in Windsor, London, Chatham, and Kitchener-Paris. It was proposed by the Authority that additional licences be sought for stations in Sudbury, Thunder Bay, Peterborough, North Bay, Timmins, Sault Ste. Marie, Kingston, Belleville, Brockville, Kirkland Lake, Fort Frances, Kenora, and Dryden. Licences have already been granted for Sudbury and Thunder Bay and these stations will be proceeded with. However, because of economic conditions and the unavailability of funds from the province, the Authority made a decision to defer action on the establishment of stations in Peterborough, North Bay, Timmins, and Sault Ste. Marie. It also delayed applications for stations in Kingston, Belleville, Brockville, Kirkland Lake, Fort Frances, Kenora, and Dryden. The postponement of construction of these eleven planned stations will mean that an expenditure of approximately \$7.5 million will not be made at this time.

Another project which the Authority was studying had to be abandoned in 1975, because of lack of financial resources. The Authority has dropped its proposed participation in experimental programs on the Canada-United States Communications Technology Satellite after spending about \$175,000 developing its proposal. The Federal government had selected the Authority as one of the agencies that would provide programs. The Authority intended to determine the educational and social implications of the use of the Communications Technology Satellite and it was allotted nine months' time on the satellite during the two-year program.

Video-tape Program Service for Educational Institutions (VIPS)

In 1972, the Authority established a Video-tape Program Service for Educational Institutions (VIPS) in order to fill a demand by educators for video-tapes of Authority programs.⁷ The service supplied video-tapes to universities, colleges, elementary and secondary schools, libraries, and other non-profit educational institutions at nominal cost.⁸

The VIPS service makes it possible to play a video-tape of a program at a time convenient to the teacher or group without having to rely on a rigid broadcast schedule. An increasing number of schools in Ontario have acquired video-tape recorders. The Authority provided video-tapes to isolated areas beyond the range of television and cable companies. The video-tape recording has become recognized as a highly-flexible instructional tool. It has the potential to ensure that much of the best of educational television programming is used in the instructional program while omitting less relevant material.

Organization

The nature of educational television requires a sophisticated organizational structure to deal with particular areas such as production of programs, utilization, technical operations and engineering, evaluation, research and development, as well as the more common administrative matters such as financial administration, personnel relations, and general administration. The integration of these diverse operations is essential to the successful achievement of the Authority's purposes. The Authority began with an organization⁹ adapted from the one which had been developed while responsibility for educational television was with the Department of Education.

⁷VIPS1, A Video-Tape Program Service for Educational Institutions, The Ontario Educational Communications Authority, Toronto, May 1972, p. 1.

⁸Annual Report 1972-1973, The Ontario Educational Communications Authority, Toronto, September 15, 1973, p. 41.

⁹The Ontario Educational Communications Authority, Annual Report/1970-71, op. cit., pp. 27-28.

Almost from its beginnings the Authority has experienced difficulties in its organizational operations. Because the activities of the Authority expanded at a rapid rate in its early years, it was probably inevitable that changes in organization and procedures would be necessary. In any case, in 1972, the Authority itself commissioned a study of its organization by Price Waterhouse Associates, Management Consultants. In a Report,¹⁰ dated October 13, 1972, the consultants commented on their studies which included Management Informations Systems; Delegation of Authorities; Computer Utilization; Provision of Assistance and Advice Relative to Function of Director, Finance, Administration and Personnel; and Programming Branch Management Development Program. They also presented a detailed "Recommended Organization Chart" incorporating a substantial number of changes in the then existing structure, a number of which were implemented.

In mid-1973, there was considerable turmoil within the organization and some of this came to public attention. It was characterized by resignation of a few executive personnel, substantial turnover of other staff, and charges of inefficiency and waste of financial resources. The Chairman of the Authority, responding to the accusations, agreed that an independent and objective assessment by someone who would have the respect of the public was desirable to get to the bottom of the charges levelled against the Authority.¹¹

Because of the complex nature of the activities with which the Authority must deal, and particularly because of the technical aspects of much of the work, we did not endeavour to examine the administrative organization of the Authority. Nonetheless, we feel impelled to observe that the combination of the positions of chairman of the Authority, director, and chief executive officer, in one person is an unworkable arrangement. It makes demands on the incumbent that go far beyond reasonable expectations. It

¹⁰ Ontario Educational Communications Authority Report on Organization Study, October, 1972, Price Waterhouse Associates, Toronto, October 13, 1972.

¹¹ Legislature of Ontario Debates - Standing Committee of Supply, Estimates, Ministry of Colleges and Universities, S-42, S-43, S-45, June 14, 15, and 19, 1973.

combines to too great an extent the policy-making function and the administrative role, with difficulties of accountability to the board of directors. It may well mean that too much authority is consolidated in one official to the detriment of ease of communications, control, and attention to priority matters. It is our view that the chairman of the board of directors should not have other duties with the Authority and that the chief administrative officer should be appointed by the board of directors but not be a member of it.

Regional Councils

Under the Act which established the Authority, provision was made for the appointment by the Authority of such regional councils and such advisory committees as it considered necessary to advise it in developing the policy and operations of the Authority. Provision also exists for the payment by the Authority of reasonable travelling and living expenses for members of these councils or committees. Shortly after it began operations, the Authority appointed five Regional Councils, one in each of Eastern Ontario, South Central Ontario, Southwestern Ontario, Northeastern Ontario, and Northwestern Ontario. Each committee had approximately fifteen members appointed from communities in the geographic area and chosen from elected representatives, educators, parents, and the general public. Each Council was to advise the Authority on matters relating to educational television in its area and to serve as a means of publicizing and informing the general public about developments in the medium.

There is little doubt that the Councils have exerted a strong influence on the provincial government to extend educational television coverage to almost every part of Ontario. In pursuit of this objective, each Council has been a pressure group acting in what it considered to be the best interests of its area. As a result, the board of directors of the Authority has had powerful allies in its demand on the province for the financial resources necessary to establish stations in many centres throughout the province. While the principle of involvement of the public in the decision-making process has a great deal of merit, nevertheless, a question arises about the propriety of the Authority organizing at public expense its own special-interest groups to further their own purposes and those of the

Authority without due consideration for the general public interest. In addition, it is not clearly established that a separate network of educational television stations is the only way to deliver the services; that such action is economically wise or financially sound; and that the decision of the Authority to do so was made without due regard for all the circumstances that a truly objective assessment might have anticipated. In our view, the Councils have been in existence for a long enough period that their purposes, method of appointment of members, term of office, and cost should be assessed to determine the desirability of their continued existence.

Relationship of Authority to Ministry of Education

The present organizational structure of the Authority as an agency with a separate identity places on it a heavy responsibility to ensure the closest possible liaison with the Curriculum Branch of the Ministry of Education. That Branch has responsibility for development of the broad goals and objectives for education in Ontario and for the preparation of curriculum guidelines designed to achieve those purposes at the elementary and secondary school levels. Consequently, the Authority must have regard for the responsibilities of the Curriculum Branch in the development of its programs. This relationship is also important in the definition and role of educational television in in-school settings.

From time to time, there have been questions raised about the adequacy of the consultative process between the Authority and the Ministry of Education, in so far as it relates to the attainment of the goals and objectives of education through development of educational television programs for the schools. The remoteness of the two agencies from one another in an organizational way and in terms of the reporting function make it relatively easy to understand how the Authority could go its separate way without due regard for its specific function in the attainment of high quality education.

Educational television is a device to assist the teacher in his endeavours to provide a first-rate learning environment for his students. While most people recognize and accept the fact that television is a powerful medium of communication, it is one of a number of means that the teacher can use to achieve his purposes. It belongs in a category that includes other

"technology" such as text-books, films, and filmstrips. It has never been considered necessary or even desirable to establish a separate authority outside the Ministry to provide these instructional tools. The major justification for the use of educational television in the schools has to be the extent to which it is uniquely suited and adaptable to the attainment of the goals and objectives of the curriculum topics being presented. To the extent that educational television is used apart from these purposes, or if it is seen as a tool to be used for its own sake, it is open to the criticism that it is merely entertainment, largely irrelevant, basically unnecessary, and a waste of time, effort, and money. If these circumstances occur, educational television is doomed ultimately to fall into disuse and oblivion, at least in so far as the formal educational program is concerned.

There are, however, ways in which educational television can make an important contribution to the attainment of educational goals at the pre-school, adult, professional, and other levels. But again that contribution should be geared to the purposes of the educational programs and not as an independent activity devoid of an understanding of its role as a tool to be used in the attainment of recognized educational goals.

Another expression of the difficulty described above is the relative importance to be given to the advice and direction of professional educators and technical personnel in the production of programs for school children. Educators may insist that content be related to educational goals and that it be presented in a manner consistent with the way children grow, develop, and learn. Technical personnel may find these conditions restrictive and limiting in possibilities for the development of creativity, imagination, and uniqueness in the use of the medium. No amount of indignation on the part of "creative artists" in the medium about the involvement of educators in the development of educational television programs or on the limitations placed on them by educators will overcome the lack of relevance of programs that are not oriented to the achievement of the goals and objectives of education. There is a great need for the development of a working relationship that recognizes the points of view of both educators and creative technical personnel and the role each must play to produce the best possible programming. Such a relationship must provide for consultation and discus-

sion of goals and objectives. It must leave room for the creative artist in television to exercise his talents in the production of programs that are artistically of high quality. But it must also ensure that those programs have significance for the purposes of a creative school system as identified by the total community, represented by teachers, parents, students, trustees, administrators, and the general public.

The Committee was concerned that the relationships it considers desirable were not being adequately promoted or implemented and that, as a result, the matter of relevance may become an increasingly difficult problem. Some of the attitudes of school personnel that have resulted in limited use of educational television may be an indication of this development. The existing organizational framework, whereby the Authority operates largely as a separate entity, makes the essential close relationship between those who determine the curriculum guidelines and those who produce educational television programs difficult to achieve and in practice all too often nonexistent.

In any case, reliance on educators in the employ of the Authority should not be considered a satisfactory substitute for close liaison with curriculum personnel in the Ministry. It would seem to us that there should be some in-depth examination of the organizational relationships between the two agencies to determine the most effective method of ensuring that educational television makes its maximum contribution to the attainment of educational goals and objectives.

Some of the original reasons for the creation of the Authority as an "independent" entity may no longer apply with equal force. For example, as has already been pointed out, it was argued at one time that the Authority should be free of political influence in so far as programming was concerned. Realistically, any tendency towards political involvement in this aspect of the Authority's work can be dealt with just as well whether the administration of educational television rests with the Ministry of Education or the Authority. As a matter of fact, it may well be easier to detect any such influence when direct responsibility for policy and administration of educational television rests with the Minister of Education rather than with a so-called "independent" Authority.

Programming

Without going into detail, there is no doubt that the Authority has produced a large number of educational television programs of superior quality. Evidence of this is the number of awards for excellence that it has received. In addition, the Authority transmits many excellent programs produced by agencies in other jurisdictions, including a number of other countries.

An increasing amount of publicity is being given to the type of programming being introduced by the Authority to attract larger audiences from among the general public. There is little doubt that the Authority has been extending the scope of its activities beyond the areas in which it was originally involved. For example, during the 1975-76 season, it has introduced movies, a disk jockey show, dramas, sitcoms, and satirical skits. A recent article¹² in an advertisement sponsored by the Authority dealt with two movies to be shown in prime time beginning at 8:00 p.m., on Saturday evening. One was The Blue Angel, starring Marlene Dietrich, which was released in 1930. The other was Ecstasy, starring Hedy Lamarr, from 1933. The overall topic for the two movies was "Sex in the Cinema" to be supplemented by a panel of guests discussing sex in the cinema today. The latter device seems to be designed to justify the showing of the two films as an educational television program.

Commercial television stations have accused the Authority of invading their programming jurisdiction by the use of purely entertainment programs thinly disguised as educational in nature. Some of the Authority's activities lend credence to these accusations. They raise the question of the Authority's right to operate in these areas in the light of its original mandate. In any case, if educational television is using public funds to compete with private corporations in the commercial television field then the complaints of the private broadcasters seem legitimate. Resolution of the problem will require a clearer definition of the original terms of reference for educational television and a more definite delineation of the respective fields of operation of the two groups.

¹²"Celluloid Sex", TV Ontario, Advertising Supplement, Friday, April 2, 1976, p. 2.

Perhaps lack of definition of the content area for educational television is also responsible for other criticism of the Authority. For example, in recent months the Authority decided to drop a proposed series on Human Sexuality after a critical reaction from some sectors of the public and the media.

In more recent years, the Authority has been extending the geographic scope of its program production beyond the studio setting. For example, in 1975, the Authority presented two series produced on location in Africa. One series in nineteen parts was entitled The Africa File and was the result of more than two years of reporting on a number of African countries. The series is of significance in the program of social studies, especially because of its topical nature. The question arises, however, about the priorities of the Authority that would justify the substantial expenditures of public funds to produce the series on Africa. The opportunities for repeat showings of the programs are limited because of rapidly-changing social and political conditions in Africa which will tend to make the content obsolete in a short time. It may well be that reliance for such material should be placed with other sectors of the media, given the limitations of the financial resources of the province and the priorities of the total educational enterprise.

In March, 1974, the Authority sponsored its first workshop on "The Transition to a Conserver Society: The Role of the Media." A second workshop was held in Toronto in May, 1975,¹³ to consider "The Futures Project of the Ontario Educational Communications Authority." The Report¹⁴ of the second workshop contains a statement prepared by Dr. James Dater, the Futures Project Coordinator, who was on secondment at the time from the University of Hawaii, on the "Basic Philosophy, Purpose, and Themes" of the Project. The author sees the problems of society resulting in a choice between a better - or at least a livable - future and one of catastrophe and chaos. The choice in his view seems to depend on "the ability of people to make appropriate decisions in sufficient time." He goes on to state that "The solutions to our problems are human rather than technological - although

¹³ Alternative Futures and the Role of the Media, Workshop 2, The Ontario Educational Communications Authority, Toronto, 1975.

¹⁴ Ibid, p. 5.

technology will certainly play a significant part in the human response. But the role of technology must be more clearly and consciously subservient to human needs and desires than has characteristically been the case heretofore."

"If our fundamental need is for people who will make appropriate decisions in sufficient time, then we need people who are motivated, informed, sensitive to the values and perceptions of others, and within political structures which facilitate relevant action." In the attainment of the purposes which Dr. Dator identifies, he believes that "the communications media also have not sufficiently recognized their unique obligations and opportunities in this most critical time."¹⁵

There are a number of questions which arise from the statement of basic philosophy and the other parts of the Report of the workshop. Is The Futures Project attempting to create in the minds of the people a direction for society in Ontario including the establishment of "political structures which facilitate relevant action"? If so, is this a mandate that has been given to the Authority or is it one that it has assumed? While the importance of discussion of the future of society by distinguished international delegates is unquestioned, how representative of society in Ontario were those who attended the workshop, if any decisions were to be based on any consensus reached at the workshop? In the absence of any representation at the workshop from the Ministry of Education, can it be said that there is an adequate relationship with those responsible for the establishment of the broad goals of education at the elementary and secondary levels? Is the Authority proposing to assume the function of determining goals and objectives of education in so far as educational television is concerned? If so, is it possible that the overall goals of the schools and those disseminated by educational television will be inconsistent and incompatible?

The concerns inherent in the above questions are put in this form to emphasize the necessity for clearer delineation of the function of educational television, to point up the importance of greater clarity in the relationships between those working in educational television and those responsible for determining broad educational goals at the provincial level.

¹⁵Ibid, p. 5.

It seems essential that the answers to these questions must be found through a far more widespread dialogue among more representative public bodies, agencies, authorities, and the general public. Until the necessary clarification can take place, it seems imperative that the Authority accept for itself a role that is more modest than the determination of the goals of either the society or the schools. At the same time, it is recognized that the Authority and the medium can make a significant contribution to the determination of those goals by those who carry that responsibility.

Audience Ratings

Ever since the Authority was established, there have been conflicting estimates of the audience ratings for Channel 19. For a number of years the Authority conducted its own annual audience surveys with the cooperation of principals and teachers in Ontario schools. A summary¹⁶ of the results of the survey for 1971-72 was issued in November, 1972. In the fall of 1972, a more elaborate survey was begun with the first phase evaluating the Authority and C.B.C., programs telecast from September 11 to December 22, 1972.¹⁷ In addition, there are the audience ratings conducted by outside agencies, such as the Bureau of Broadcast Measurement.

In spite of the statistics provided, there is a lack of convincing evidence that there is a high degree of utilization of television programs in the schools. This uncertainty, combined with periodic reports that certain school systems are not convinced of the value of the programs or that they do not make use of them, raises some doubts about the validity of the audience survey data. The Authority itself seems to feel that its ratings for programs clearly within the definition of educational television have not been sufficiently high to justify the Authority's existence. Whether this is a fact or not, the Authority has launched a programming and advertising campaign designed to attract viewers by the provision of purely

¹⁶ Hoichberg, Samuel, Summary of Results of the 1971-72 OECA In-School Audience Survey, Research and Development Branch, The Ontario Educational Communications Authority, Toronto, November, 1972.

¹⁷ Ontario ETV Survey No. 1, 1972, Memorandum signed by G. H. Waldrum, Assistant Deputy Minister of Education, under date of December 19, 1972.

entertainment programs. An example of its promotion is a four-page weekly Advertising Supplement, entitled "TV Ontario," which has appeared in the Globe and Mail since September, 1975. That the combination of entertainment programming and aggressive promotion is successful, in terms of appeal for general audiences, is demonstrated by the fact that at the beginning of 1975, Channel 19 was drawing 530,000 individual viewers each week, an increase of 50 per cent in 1974, and that in 1975, it increased this figure again by approximately 36 per cent. The Authority has indicated that it tripled its prime time audience in the same year.

In our view it is time that there was a full examination on an objective basis of the extent of the usage of educational television in in-school settings and in homes. It will then be possible to ascertain the actual situation apart from the promotion and bias of those with a vested interest in the outcome of such a study.

Finance

The grants paid by the province to the Authority since it was established in 1970-71 are set out in Table 27. The data shows a phenomenal growth, with estimated amounts to be provided in 1976-77 more than double those in 1970-71.

The specialist and unique activities of the Authority make it difficult for those not fully cognizant of them to make valid judgments about the necessity for the expenditures made by the Authority. Nevertheless, there have been several occurrences that raise some doubts about the soundness of the financial operations. For example, the Provincial Auditor made observations about the fiscal year 1971-72, that resulted in improved approaches to internal and budgetary controls. In the same year, a special grant of \$1,552,000 was made, of which \$100,000 was for rental costs incurred by the Authority resulting from the assumption of certain leases from the then Department of Public Works. The balance of \$1,452,000 was to cover the estimated costs incurred by the Authority in relocating to its new premises. While again it is recognized that there are special circumstances relating to the Authority's activities and even after making allowances for the sophisticated nature of the equipment used, it seems incredible that almost

TABLE 27

THE ONTARIO EDUCATIONAL COMMUNICATIONS AUTHORITY

GRANTS FROM PROVINCE OF ONTARIO

For the Fiscal Year Ended March 31,

1970-71 to 1976-77

| | <u>1976-77</u> <u>Estimates</u> | <u>1975-76</u> <u>Estimates</u> | <u>1974-75</u> | <u>1973-74</u> | <u>1972-73</u> | <u>1971-72</u> | <u>1970-71</u> |
|--|------------------------------------|--|--|----------------|----------------|---|--|
| Ministry of Education | \$7,588,000 | \$7,588,000 | \$6,979,004 | \$6,888,000 | \$6,888,000 | \$10,800,000 ^a 1,552,000 ^a | \$2,988,154 (Jan. 3-Mar. 31-71) 6,159,807 (ETV Branch) |
| Ministry of Colleges and Universities | | | | | | | |
| Ministry of Culture and Recreation | 10,379,000 903,000 ^c | 9,350,000 ^b 3,376,000 ^b | 7,800,000 ^b 1,500,000 ^b | 6,709,500 | 6,000,000 | | |
| Total | \$18,870,000 | \$20,314,000 | \$16,279,004 | \$13,597,500 | \$12,888,000 | \$12,352,000 | \$9,147,961 |

Notes: ^a Special Grant to cover

(i) Rental costs \$100,000

(ii) Relocation costs \$1,452,000

^b Advance for Network Expansion.^c Operating/Advance for Network Expansion.Source: Public Accounts, Ontario, Queen's Printer, Toronto.
Expenditure Estimates, Vol. 4, Social Development Policy Field, Queen's Printer, Toronto.

\$1½ million would be required to move the Authority a distance of only a few city blocks.

The contractual arrangements for payment to the C.B.C., of the capital costs of the transmitter for Channel 19 and for the annual operating costs involve substantial amounts. The arrangements made or to be made for transmission facilities in other centres will involve substantial additional sums of money. The financial implications involved in the extension of facilities and programs to all parts of the province will mean still further substantial expenditures.

In the area of the "hardware" of educational television, we confess a lack of knowledge and expertise. But we are convinced that new developments, of which we have been made aware, are so numerous and their development so rapid that some overall assessment of them should be made before additional financial commitments are finalized. Otherwise, the possibility of wastage of funds is very real.

The province should be fully aware of the financial implications, both in the short-range and on a long-range basis, of the provision of educational television at its present level of operations and any possible extension or expansion of it. Any financial commitment by the province should be made solely in the light of the educational benefits to be derived from educational television that could not be realized in any other more economical way, or on the basis of priorities that clearly justify expenditures for educational television ahead of those for other programs. In any assessment of the costs-involved, the expenditures by school boards should be included.

Conclusion

With one exception, we have not made specific recommendations relating to the Authority. Rather, we have limited ourselves to identification of areas about which we have unanswered questions and concerns. In our judgment it is time to examine fully on an objective basis the role of educational television in Ontario. We believe that the relationships between educational authorities, particularly the Ministry of Education and

its curriculum personnel, and the Authority should be reexamined. There is a real need for a clear definition of the role of the Authority in the attainment of accepted goals and objectives of the school system and of its role in relation to other broadcast agencies. The means of production and delivery of educational television programs should be reviewed to ensure that the operations of the organizational and financial administrations are making the most economical and effective use of the financial resources provided by the province.

The kind of study we are proposing should be made by an independent body with no doubt about its objectivity. It should include in its membership representatives of a wide spectrum of society. It should be able to commission research studies conducted by reputable organizations without any possibility of self-interest on their part. Since its creation in 1970-71, the Authority has received grants or has had commitments from the province totalling more than \$100 million. The public should now be provided with objective evidence that an expenditure of this magnitude has been justified before additional resources are committed. Until the results of the study we propose are available, it is our view that no provision for further extension or expansion of programming or facilities should be made.

CHAPTER 5

MINISTRY OF EDUCATION

Responsibility for Provision of Education

Under The British North America Act, 1867, responsibility for the provision of education was assigned to the provinces. There can, therefore, be no doubt that the authority for the overall structure and organization by which educational services are delivered rests with the legislature of each province. In Ontario, public education had its origins in the initiatives of churches and individuals long before Confederation. By 1867, the concept of local school boards to administer schools was well established. It was Egerton Ryerson who recognized the need for a strong central authority to ensure that minimum standards were achieved. In the pursuit of this objective, he was responsible for the introduction, among other innovations, of teacher education programs, courses of study, school inspection, textbooks, and examinations. The assumption of these functions established a presence for the province which was eventually formalized by the creation of the Department of Education in 1876, nine years after Confederation.

There was a real need for the creation of a central authority in Ryerson's day. The multiplicity of school boards, each to serve a local area; the isolation of each settlement and the difficulties of communication with one another; the lack of sophistication of the pioneers regarding education; all contributed to the need for some central direction to ensure that at least a minimum level in education was being attained. It is important to recognize that it was the desire to achieve a basic minimum standard that justified the creation of the strong central authority in the first place.

Tradition of Local Autonomy

It is also a significant fact that, before the formal establishment of the Department of Education as the central authority in education in Ontario, there was a tradition of election of local citizens to school boards. Almost all the funds for the financing of education were raised in one manner or another by the citizens of the community. This combination of participation in decision-making at the local level and the provision of most of the funds to provide education built a strong feeling of independence and

autonomy on the part of the local authority. As late as 1943 in Ontario, the Department of Education was providing, through General Legislative Grants, a total of only 16 per cent of the cost of education at the elementary and secondary school levels. The remainder of the funds was raised by taxation at the local level.

Function of Ministry of Education To-day

Developments in society and in education call for a new role for the Ministry of Education today and for the future. The circumstances that justified the creation of a strong central educational authority in the mid-nineteenth century have changed tremendously. Speed of communication and travel have become almost instantaneous and rapid respectively. There is no need to go through a central clearing house to disseminate findings and developments in education in any one jurisdiction. Indeed, if such a procedure is followed, it will likely slow up the process. Most administrative units are now sufficiently large that they have their own personnel, with outside professional resources available on call when necessary, to implement desirable innovations, experiments and improvements. The general public has a much higher proportion of well-educated citizens who are knowledgeable and sophisticated about the kind of education they wish for their children. The need to ensure "minimum standards" has been replaced by the desire for high quality education. The academic and professional preparation of teachers has reached the highest level ever. Research has developed the knowledge to permit a potentially great education to be realized.

In addition, developments in the society in the last decade have emphasized the wish of citizens to have a part in the decision-making process that determines the quality of life in their communities. Units of educational governance represented by city, county and district boards of education that can be justified on the basis of their efficiency administratively must find the means to be educationally responsive to the wishes of the communities within their jurisdictions. There is evidence that this is happening by making the individual school the basic unit for curriculum improvement, by creating families of schools serving a local area, by the allocation of greater fiscal responsibility to each school, and by the involvement of parents in the activities of the schools their children attend. It is our view

that these are desirable directions, that they are not as widespread in practice as they should be, but that it is inevitable that they will be implemented at an accelerating rate in the years ahead. If the latter prediction is fulfilled, we will have the best of both worlds - an efficient administrative unit and an educationally responsive school system.

The desire for a responsive administrative unit and a high quality educational system dictate a particular role for the Ministry of Education in the last quarter of the Twentieth century. It must be recognized that the traditional pattern of strong control by the central authority can only lead to a minimum standard of mediocrity. The existence of a large bureaucracy remote from the local situation cannot be responsive to educational needs as they find expression in the great variety of circumstances across the province of Ontario. Maintenance of a strong central control assumes a degree of knowledge and expertise on the part of officials of the Ministry of Education that is superior to that of local representatives and appointed officials. In the city, county, and district boards, any such assumption is open to serious question. Even if the assumption were valid, there would still be the administrative difficulty of implementation of innovative, experimental, and creative programs in unique situations about which the representatives of the central authority cannot possibly be sufficiently knowledgeable.

It must be recognized that changes in society will call for adaptations in the schools. Solutions to the problems that will emerge in education will rarely, if ever, be found in a return to programs, practices, and procedures that were discarded for good and sufficient reasons. New problems call for new solutions. Rarely will those solutions apply on a province-wide basis.

A desirable innovation in education is more likely to be introduced in a particular school board jurisdiction or a local school in response to a need that has been identified by those who live in the community and who are knowledgeable about the circumstances that exist there. The probabilities of success of the innovation are enhanced greatly by the active participation, not only of professional educational personnel but also of parents, members of interested organizations, trustees, and others in the community

in program planning, implementation, and evaluation of the innovation. Their involvement, to the extent that their particular interests, abilities, and desires permit, develops commitment to the planned change and enables them to move forward when they are ready to do so. This approach to improvement of the educational program in a particular community or school is sometimes referred to as the "broken front" method.

The usual alternative to the broken front approach to improvement of the educational program has been through the decision of the central authority at the provincial level to introduce change in all schools on a province-wide basis. This method has been characterized as the "solid front" approach. There are a number of weaknesses and limitations in this pattern. For example, because all schools are required to implement the same change within approximately the same time span, it is necessary to move the huge monolith represented by the total educational enterprise at one time. It is inevitable that this will not be possible for a variety of reasons but inability to achieve unrealistic expectations often results in disappointment, frustration, and discouragement.

Among the reasons that account for the lack of success are the following. The great number of variables that exist across the Province of Ontario, as represented by geographic factors, socio-economic conditions, cultural backgrounds, occupational pursuits, and population distribution, make it highly unlikely that any proposal for educational improvement emanating from the central authority will have relevance or applicability to the priority needs of a particular school board or school jurisdiction. Because there is rarely only one solution to a variety of needs and problems in education and because the central authority can never be fully aware of circumstances and conditions in all parts of the province, it is difficult or almost impossible for the Ministry of Education to prescribe adequate solutions to needs and problems on a province-wide basis that are equal or superior to those developed by local authorities. All too often, because a change prescribed by the central authority is made applicable to all the schools, the Ministry of Education is likely to delay action until there is widespread acceptance of a proposed improvement. The individual "lighthouse" school or school system is often in a position to identify the need for a proposed change in its jurisdiction before the Ministry is aware of

the problem and is able to take steps to meet that need more promptly and more effectively.

There are some dangers inherent in the solid front approach to educational improvement. Because the central authority puts forward its proposals supported by its legal authority - expressed or implied - there is a strong tendency for these proposals to be accepted in specific local situations where they may even be detrimental to the educational program. Where nominal acceptance of the central authority's proposals or directives is the result of the exercise of legal authority or coercion, without conviction on the part of the recipients, positive educational results are likely to be limited or non-existent. All too often there is a lack of understanding or appreciation at the local level of the central authority's proposals. Because people at the local level are not involved in the decision by the central authority to promote specific changes in education, there is a lack of commitment to and enthusiasm for them. Lacking these requirements for success, the chances of widespread and satisfactory implementation of any central authority proposal are minimal.

If people at the local level adopt proposals, particularly in the curriculum area, because they are put forward by the central authority, they are unlikely to develop local initiatives to meet their particular needs and problems. It is all too easy to conform to directives from a central authority and in the process to abdicate responsibility and accountability for the school program, using the argument that it is someone else's fault when goals are unrealized. This reason alone should be sufficient to dissuade the central authority in a democratic society from prescribing what it wishes to have happen educationally in the many jurisdictions and communities across this province. Rather, the Ministry should exercise its leadership role through the provision of resources of personnel to assist local authorities to achieve their goals, to encourage them to meet their own needs, to solve their own problems, and to be creative. In this way, the Ministry can perform in a manner consistent with the goals and objectives of the educational program for the children who attend the schools and can set an example of the way school boards should deal with their staffs, and the way teachers and other workers in the educational field should relate to their communities.

Decentralization in Education

During the latter half of the 1960s, the then Department of Education made significant strides towards decentralization of the educational enterprise. For example, it established Regional Offices in ten areas of the province. It created larger units of school administration capable of assuming a number of functions formerly performed by the Department. The use of provincial school inspectors was discontinued. Curriculum guidelines replaced more detailed courses of study. During the last five years there has been considerable ambivalence on the part of the Ministry of Education regarding the degree of decentralization of decision-making that it will allow school boards. For example, in 1971, the Ministry established expenditure limits beyond which boards could not commit themselves financially.¹ At the same time, the boards had responsibility for negotiating salary contracts with their teachers and other staff for almost 80 per cent of their operating expenditures. This division of control put some boards in a difficult position in that they had responsibility to negotiate contracts but did not have authority to make the expenditure that the settlements might require. Now, in 1976, when economic circumstances are less favourable than they were in 1971, the Ministry has removed the expenditure ceilings. One of the reasons given for this action is to restore the autonomy of school boards to decide the level of expenditure that their ratepayers and supporters will accept.

In other matters, where authority has been delegated by the Legislature to school boards, it is imperative that the boards be permitted to exercise their responsibilities and to be held accountable by their constituents for their actions. For example, under The Education Act, 1974, boards have authority to determine the number and kind of schools to be established and maintained.² Under the same Act, where the number of Indian pupils enrolled in a school under the jurisdiction of a board is fewer than the numbers specified in the legislation, the board may at its discretion appoint a

¹Regulation - General Legislative Grants 1971, Ontario Regulation 59/71, as amended, February 4th, 1971, p. 8.

²The Education Act, Statutes of Ontario, 1974, Chapter 109, Section 147, subsection (1), paragraph 6.

representative of an Indian band to the board.³ In either example the board is empowered to make a decision without reference to any other administrative organization or elected body. At the same time, the board has the right to expect that it will be free of usurpation of its prerogatives by these agencies.

The principles of authority, responsibility and accountability of school boards in matters which boards have by statute the right to decide should be understood and respected by all concerned - by the Legislature, by the Ministry of Education, by all political parties, by the general public, and even by those who do not agree with the decisions of school boards. Otherwise, the place of local government of education is eroded and its effectiveness and significance in the eyes of the public reduced. Certainly, all these groups have the right to criticize, to attempt to persuade, and to use the procedures open to them in a democracy but these do not include coercion or undue pressure. Where the decision of a school board is considered to be in contravention of the law recourse may be had to the courts. Where the decision of a board is within its authority and in accordance with the law but still considered undesirable or unacceptable by a segment of the population within the school board jurisdiction, the correction of a perceived wrong must lay in the exercise of the democratic prerogative at the next election of trustees to the school board. Only in this way can local government and democratic procedures remain strong and effective.

Leadership Role of the Ministry of Education

Within the context of a delegation to school boards of responsibility and corresponding authority for the conduct of education at the local level, there is a most significant and important role for the Ministry of Education. That role involves the exercise of the leadership function. A great deal depends on the interpretation of "leadership" by the central authority. In our view that function can best be exercised by the delegation to school boards and other agencies of those duties and responsibilities that they

³Ibid, Section 162, subsection (6).

can perform or assume. In that way, most of the decision-making will be made close to the people who will be affected by the decisions and at a level where they will have an opportunity to influence those decisions. The criterion of parental involvement in determination of matters that affect the education of their children can best be met in this manner. If this principle is accepted, the opportunities for democratic leadership, rather than autocratic direction, are greatly enhanced. Then it will be possible to build a joint leadership of Ministry and school boards and to reduce the tension and opposition that now prevails in some jurisdictions. The concept is well expressed in a quotation attributed to Thomas Jefferson when he said:

"I know no safe depository of the ultimate powers of society but the people themselves; and if we think them not enlightened enough to exercise their control with a wholesome discretion, the remedy is not to take it from them, but to inform their discretion by education."

The Ministry of Education should concentrate its leadership efforts in those areas that cannot be served adequately by any other body or agency. These include the determination of broad educational goals which have their origin in the international, national, and provincial contexts; the development of curriculum guidelines for the use of local authorities who have responsibility for the implementation of programs; the provision of a substantial proportion of the finances for education; the presentation of legislation; the certification of professional personnel who serve in the educational system; and the provision of resource personnel as, for example, program consultants, available to local school jurisdictions to act in an advisory capacity as desired by local school authorities. Part of the Ministry's responsibilities in these areas would be to consult with school boards, teachers' organizations, representatives of administration agencies, teacher education faculties, research bodies, parent associations, and other interested citizen organizations and agencies in the formulation of decisions for which it carries responsibility.

The corollary of the allocation to the Ministry of the duties described above is that the Ministry will divest itself of many of the organizational and administrative duties that can be performed by other agencies, that absorb the time and energies of elected representatives and appointed officials of the province; and that all too often are allowed to become a sub-

stitute for the exercise of leadership. Specific references to provincial involvement in matters that can be handled by other agencies will be made in the balance of this chapter.

Organization of the Ministry of Education

The organization of the Ministry of Education on June 1, 1976, is shown in Chart 1. The head is the Minister of Education who is responsible to the Premier, the Cabinet, and the Legislature for conduct of his portfolio. He is assisted by a Deputy Minister who is the senior appointed official responsible to the Minister for the administration of the Ministry. Communication Services and the Council of French Language Schools report directly to the Deputy Minister. There are three main units which also report to the Deputy Minister and each is known as a "Division". Each Division has a number of subdivisions, each of which is a "Branch". A subdivision within a Branch is designated as a "Section".

The number of regular employees of the Ministry of Education for the fiscal years 1971-72 to 1974-75 inclusive are shown in Table 28.

TABLE 28
MINISTRY OF EDUCATION
NUMBER OF EMPLOYEES
1971-72 to 1974-75

| <u>Fiscal Year</u> <u>ending</u> <u>Mar. 31, 1972</u> | <u>Fiscal Year</u> <u>ending</u> <u>Mar. 31, 1973</u> | <u>Fiscal Year</u> <u>ending</u> <u>Mar. 31, 1974</u> | <u>Fiscal Year</u> <u>ending</u> <u>Mar. 31, 1975</u> |
|---|---|---|---|
| 2,156 | 1,987 | 1,835 | 1,821 |

Source: Civil Service Commission Annual Report 1974-75, Sessional Paper No. 35, Civil Service Commission, Toronto, 1975, p. 22.

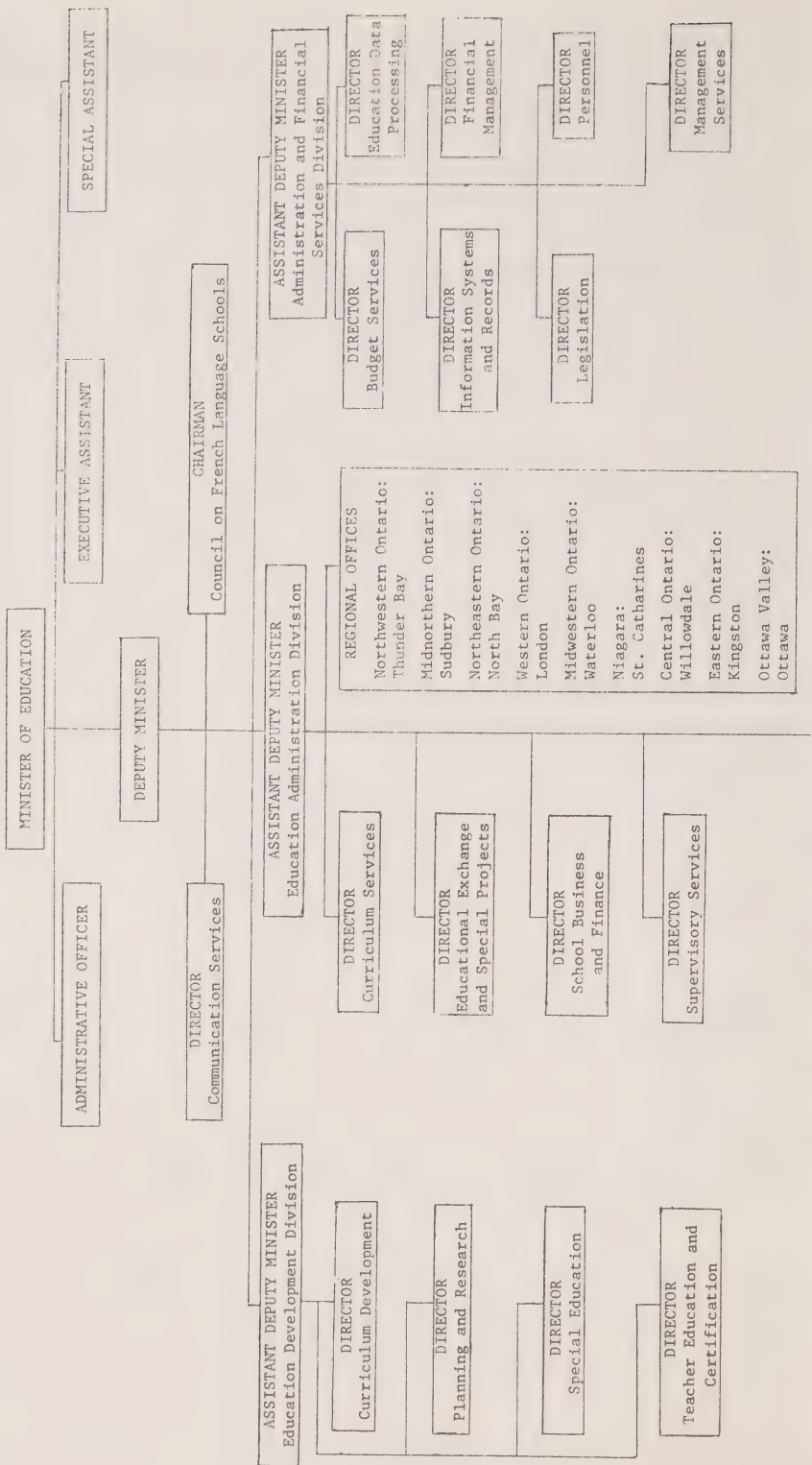
In addition, the Ministry of Education employs a number of contract staff. On April 1, 1975, the number was 953 at an estimated bi-weekly total salary of \$339,000.⁴ If these figures are calculated on an annual basis the cost

⁴Legislature of Ontario Debates, No. 47, Friday, April 30, 1976, p. 1868.

CHART 1

MINISTRY OF EDUCATION, ONTARIO ORGANIZATION

June 1, 1976



is approximately \$8,800,000, or an average of \$9,235, per contract staff employee. The total number of staff on April 1, 1975, was 1,821 plus 953, or 2774.

The remainder of this chapter deals with the role and responsibilities of the different organizational units, the factors that affect their ability to perform the functions assigned to them, and offers comments and suggestions in the light of our view of the responsibilities and authority of the Ministry of Education.

Communication Services Branch

In the reorganization of the Ministry in 1972, provision was made for a Public Information Services⁵ Branch reporting to the Deputy Minister of Education. At the same time, the Library and Information Centre Branch⁶ was established in the Administrative and Financial Services Division. The duties of the respective branches were set out at that time. On March 8, 1973, these two branches were amalgamated under the name Communication Services Branch with reporting relationship being to the Deputy Minister of Education. Included in the new Branch were sections designated Internal Information Services; Production Services; and Public Information Services. Later, two of the sections were renamed Communication Service and Creative Services. The Public Information Section was continued and the Information Analysis Centre was established.

In the organizational structure it is difficult to understand the necessity for the reporting relationship of the Communications Services Branch to the Deputy Minister of Education. Much of the work of the four sections has to do with the provision of services to other units of the Ministry of Education. To do this work requires administrative organization and procedures. In both of these aspects of its operations, the Communications Services Branch is little different than several of the branches within the Administrative and Financial Services Division. As has been pointed out, the former Library and Information Centre Branch was in that Division and it seems

⁵The Role and Structure of the Ministry of Education, Ontario, op. cit., p. 9.

⁶Ibid, pp. 45-46.

appropriate that it should have remained there. Except possibly for the direct information services to be provided to the Minister of Education, there seems little justification for the Communications Services Branch, employing the number of persons that it has on its staff, to report directly to the Deputy Minister of Education.

It is necessary to draw attention to the number of employees in the Communications Services Branch. In the fiscal year 1973-74, there was a total of 48 on complement as follows:

| <u>Library</u> | | <u>Public Information Services</u> | |
|--------------------|-----------|------------------------------------|-----------|
| Director | 1 | Director | 1 |
| Librarian | 6 | Public Relations Officer | 11 |
| Library Technician | 10 | Artist | 3 |
| Clerical | <u>9</u> | Clerical | <u>7</u> |
| Total | <u>26</u> | Total | <u>22</u> |
| Grant total 48 | | | |

The estimated budget for the Library was \$362,700 and for Public Information Services it was \$455,700, for a total of \$818,400.

The Communications Services Branch now has a multiplicity of positions and titles. The total number of employees includes a Director of the Branch, a manager for each of the four sections, and 30 other persons with designated titles. This number does not include any personnel who are classified as assistants to the 34 persons referred to, nor does it include any clerical personnel.

While it is appreciated that the need for the collection, production, and dissemination of information has increased during the last decade, it is in our view difficult to justify the increase in personnel and costs for the Communication Services Branch. There are considerable economies that could be effected by a rigorous assessment of this Branch and by a determined effort to have it perform only essential services. At the same time, consideration should be given to the possibility of contracting out to private agencies a good part of the work that is now performed by Ministry staff as, for example, in the Creative Services Section.

Education Development Division

There are four branches within this Division - Curriculum Development, Planning and Research, Special Education, and Teacher Education and Certification. Each branch is headed by a Director. For the most part, this Division deals with the development of the instructional program although there are a number of anomalies which make its role less than clear and which cause confusion in terms of its responsibilities and authority.

(a) Curriculum Development Branch

The major responsibility of the Curriculum Development Branch is to generate ideas and to recommend policies in the instructional program area. The chief manifestation of these functions is found in a curriculum guideline for each of the subject areas. "A guideline is a pattern for planning as opposed to a plan for teaching. Its purpose is to prescribe a philosophy for schools in a given area of study in general terms so that teachers might devise their own courses of study from it. It is normally a short and concise statement describing the parameters of a subject and includes the best of current opinion, research and trends. Often various methods and alternative organizations of content are also included."⁷ The guideline sets out in a general way the aims and objectives of a particular area of study.

These guidelines are developed by committees representative of a variety of interests in the profession and in society. Other guidelines of a more general nature deal with organization and diploma requirements,⁸ approved and recommended textbooks,⁹ and supplementary

⁷ Curriculum Guidelines Committee - The Committee's Operating Procedures, Memorandum, dated June 22, 1972, Ministry of Education, Ontario, Toronto, 1972.

⁸ Secondary School Diploma Requirements, Circular H.S.1., 1975-76 and 1976-77, Ministry of Education, Ontario, Toronto, 1975.

⁹ Circular 14 Textbooks, 1975, Ministry of Education, Ontario, Toronto, 1975.

and reference materials.¹⁰

Within the Branch there are four major standing committees - Guidelines, Cyclic Review, Standards, and Media. The Guidelines Committee is responsible for processing the development of subject revisions and new course outlines. Its work includes the preparation of research evidence, position papers, and documentary materials that relate to the particular guideline being developed. The Cyclic review Committee examines the curriculum on a periodic basis to ensure that it is consistent with present and future needs of students in the primary, junior, intermediate, and senior divisions of Ontario's educational system.¹¹ The Standards Committee is a collective effort to evaluate and establish standards using the knowledge and expertise of each member of the Committee. Specifically, the group sets standards for approval of experimental courses to be conducted by school boards or an individual school. The Media Committee helps to develop materials that support curriculum guidelines. This includes the maintenance of close liaison with publishers and producers of a wide variety of educational materials.

The staff of the Curriculum Development Branch includes approximately twenty education officers plus a similar number of administrative, secretarial, and other support personnel.

It is our view that the Curriculum Development Branch fulfills an important function in the educational enterprise in Ontario. It is imperative that there be coordination of course offerings in subject areas if duplication of courses is to be avoided at various levels. It is important that research findings in all areas of the curriculum, in child growth and development, in the relationships between school and society, and in the utilization of the most modern teaching materials be applied to the extent that this is possible and desirable in

¹⁰ Circular 15, Canadian Curriculum Materials, Ministry of Education, Ontario, Toronto, 1974.

¹¹ New Dimensions, January/February, 1973, Ministry of Education, Ontario, Toronto, 1973.

the development of curriculum guidelines. These requirements can best be met by the employment at the central level represented by the Ministry of Education of full-time, highly-qualified staff with special expertise in the curriculum field. It is also highly important that determination of the more detailed content and procedures for implementation of the guidelines be left to school boards and their schools.

The role assigned to the Curriculum Development Branch at the present time represents only one aspect of curriculum development as it is understood in the professional literature. For the most part curriculum development presupposes involvement in the determination of broad goals, in the setting of objectives in subject areas, in the selection of priorities, in the development of strategies for the implementation of topics, and in the specification of procedures for evaluation of the extent to which the purposes have been achieved. The results are then used to modify goals, objectives and procedures with a view to the attainment of more realistic and effective programs in the future. We will have more to say about the manner in which provision for the totality of curriculum development is recognized by the Ministry of Education when we consider the Curriculum Services Branch and the Service for Co-operative Evaluation of School Systems in the Supervisory Services Branch, both assigned to the Education Administration Division.

(b) Planning and Research Branch

"The Planning and Research Branch is primarily a service-oriented branch of the Ministry. It seeks to assist the planning and policy formulation activities of the Ministry both within its corporate structure and in the larger educational community. Its primary purpose is to improve the teaching-learning situation in Ontario's classrooms through planning - both long and short term, through research, and through statistical analysis. Significant findings are actively distributed to all who have need of such information."¹² The three major

¹² General Information in Activities and Terms of Reference, Planning and Research Branch, Ministry of Education, Ontario, Toronto, 1973.

responsibilities of the Branch are assigned to three sections - Planning, Research, and Statistical. Within the Research Section there are subdivisions to deal with Contractual Research and Grants-in-Aid Research.

The Planning Section cannot be said to meet the requirements for the development of a sound planning program for the Ministry of Education. From an organizational standpoint, inclusion of the Planning Section within one of the major divisions - Education Development Division - of the Ministry precludes adequate fulfillment of the planning function, even if the Planning Section were otherwise capable of performing that function. In addition, its designation as a Section within the Planning and Research Branch emphasizes its lack of status in relation to the three major Divisions and the many Branches in the Ministry. We have already commented on the inadequacies of the existing arrangement for overall planning.¹³ Our further studies have only served to emphasize the necessity for the kind of provision for planning that we enunciated in our earlier Report.

Since the province introduced the Program Planning and Budgeting system in the late 1960s, the Program Planning Officer and four Planning Assistants have been involved to a considerable extent in the collection and analysis of annual budget submissions from the various divisions, branches, and sections of the Ministry and in the compilation of five-year forecasts of these subdivisions for submission to the central government agencies. There is considerable justification for assignment of the processing function of these submissions to the Budget Services Branch of the Administrative and Financial Services Division of the Ministry. To a considerable extent, inclusion of the word "Planning" in the title of the Branch is a misnomer when the activities of the Section are judged by criteria usually applied to educational planning. In actual fact, the planning function is not being performed adequately by any acceptable standard. This conclusion is the inevitable outcome of the lack of commitment of the Ministry to the planning

¹³ McEwan, T.A., (Chm.), Planning, Interim Report Number Four, Committee on the Costs of Education, Toronto, February, 1974, pp. 4-10, 31-35.

function as exemplified by the inadequacy of the organizational structure for planning, by the lack of personnel with special training in educational planning and in the associated disciplines, and by the absence of a clear statement of policy that emphasizes the essential importance of planning and direction for all the endeavours of the Ministry.

The deficiencies that we have identified are responsible, at least in part, for the difficulties encountered in the funding of education at the elementary and secondary levels in 1976. Over the period from 1971, when the basic expenditure ceilings were imposed, to 1974 inclusive, the annual increase was in the range of 5.9 per cent to 11.7 per cent at the elementary level and of 2.7 per cent to 8.9 per cent at the secondary level. The total increase from 1970 to 1974 was \$204 or 40.8 per cent at the elementary level and \$231 or 23.1 per cent at the secondary level. In 1975 alone, the increase in the basic expenditure ceiling over 1974 was \$222 or 31.5 per cent at the elementary level and \$210 or 17.1 per cent at the secondary level. Therefore, the increases per pupil permitted in 1975 alone exceeded the total increases per pupil for the previous four years at both the elementary and secondary levels.

The increases in the basic expenditure ceilings in 1975 coupled with the increases permitted in 1976, and the reduction in the province's rates of legislative grant support in 1976, have combined to establish exorbitant increases in local tax rates. The absence of any warning by the province, given far enough in advance to permit orderly adjustment in the financing of education at the local level, has created dissatisfaction and confusion and has led to recriminations on the part of school boards and municipal councils towards the province. At the same time, exhortations on the part of the province asking these bodies to plan their programs and finances on a long-term basis have a hollow ring in the light of the province's *ad hoc* approach to its dealings with them. Unless the Ministry of Education establishes a sound basis for planning in education and unless the province as a whole adheres to sound planning principles in its own operations and in its dealings with agencies, such as school boards, there is little possibility that

there will be much improvement in the "crisis to crisis" situation characteristic of the operation of educational institutions at the present time.

(c) Special Education Branch

The present Special Education Branch was established on July 1, 1974, as the successor to the Provincial Schools Branch. This change was a return to the former name which had applied to the Branch from its creation many years previously. The Branch has three sections designated as Special Services, Special Schools, and a third largely-unrelated section administering Correspondence Courses. In addition, the Council for Emotionally Disturbed Children and Youth is included within the Branch.

The Branch has responsibility for developing and recommending policies and procedures on all matters which relate to the education of exceptional children. It serves as a focal point for liaison with other ministries with an interest in special education; for school boards; and for parents. The Special Services Section is charged with responsibility for the development, recommendation and implementation of provincial policies related to educational programs for exceptional children of all types for whom school boards provide programs and services. Officials of the Section relate closely with Special Education Officers in the nine Regional Offices of the Ministry.

The Special Schools Section administers the Schools for the Deaf and Blind at four centres in the province and has responsibility for the educational program at twelve centres maintained by the Ministries of Health and of Community and Social Services throughout the province. The number of full-time staff of the Ministry of Education in these institutions is approximately 1200, with others being employed on a part-time basis.

In 1975, a Council for Emotionally Disturbed Children and Youth was established by the province and placed for administrative purposes within the Special Education Branch. A major function of the Council

was to provide liaison among ministries, each of which was responsible for delivery of certain services to the individual emotionally-disturbed child. Previously, each ministry was inclined to deal with the aspect of the child's exceptionality that fell within its jurisdiction without sufficient recognition of the interrelatedness of all the factors that affect the emotional health of the child as a total personality. Representatives of the Ministries of Education, Health, Colleges and Universities, Community and Social Services, Correctional Services, Attorney-General, and of the Ontario Youth Secretariat, and the Provincial Secretariat for Social Development serve on the Council.

While the Council has been in existence for only about one year, its potential as an interministerial coordinating body working on behalf of the individual child is considerable. Just because it reports through a single ministry - the Ministry of Education - there may be a tendency for other ministries to give it a lesser priority than other agencies for which each is wholly responsible. If this were the case, it would be understandable to some degree but entirely unacceptable in terms of the importance to the individual child. In any case, since the Ministry of Education has been given responsibility for the Council, it should ensure that the Council's mandate is clearly defined, that it is operating effectively and efficiently, and that its recommendations are taken seriously by the ministries involved. In these aspects, the Minister of Education must ensure that the goals of the Council are being achieved. Otherwise, the Council could easily become just another agency of government established to give the semblance of action to meet a real and recognized need without in fact being more than a facade designed to give the impression of action from which no real improvement results.

Correspondence Courses

The Ministry of Education provides courses and lessons for approximately 55,000 persons who are unable to attend school full-time. Of this number about 500 are enrolled in courses at the elementary school level and in excess of 50,000 are young people and other adults who are working in full-time jobs. A very small number, less than 100,

are French-speaking students working at the elementary level. A permanent staff of about 120 at the central office in Toronto is necessary to develop and administer the program. In addition, approximately 750 teachers are employed on a fee basis to mark completed assignments and to advise students on their progress. The cost to the Ministry of Education in 1976-77 is estimated to be \$4,128,300.

Since there are no more than 500 pupils taking courses at the elementary level, it is a costly operation to develop new lessons for all eight grades in all subjects and to keep these up to date for this number of students. When there are no more than 50 French-speaking pupils at the elementary level, the costs are prohibitively high. These numbers include at the elementary level pupils who are absent from the province for a period of not more than three years. Some of the pupils who are out of the country and who are enrolled are from other provinces.

Given the availability of instruction in hospitals in major centres and the provision of home instruction by itinerant teachers in larger municipalities, it seems to us that there is little remaining need for correspondence courses at the elementary level in major population centres. The creation of county and district school boards has made it possible for most of these units to provide educational services to pupils who may be temporarily absent from school. For those within the province who may still be unprovided for, it would seem possible and desirable that their needs be met through arrangements made by their school boards assisted, where necessary, by the Regional Offices of the Ministry. For the small number of pupils who are absent from the province for less than three years but who are receiving instruction in the jurisdiction where they are temporarily domiciled, it would seem that private arrangements might be made by parents to ensure that curriculum guidelines and materials are provided.

At the secondary level, the great majority of students enrolled live in urban centres where day and evening classes are available to them if they wish to further their studies. Most secondary schools in the province offer a wide variety of evening classes at a nominal fee to

the student. Consequently, it seems unjustified that a full range of correspondence courses should be provided as a convenient alternative when a better instructional program already exists. For the relatively small number of students who are unable to attend either regular day or evening classes, it is quite possible that a few night classes might be provided at other hours to accommodate shift workers.

Our conclusion is that the service provided by the Correspondence Courses Branch has served a real purpose during the years of its existence. With the developments in society in terms of fast and efficient transportation services, in communications technology, in accessibility of schools and off-hour classes, we hold the view that it is no longer essential that the Ministry provide Correspondence Courses to the extent they are now offered. It is easy, particularly in government, to perpetuate services after the circumstances which justified their establishment have changed radically or have disappeared entirely. Certainly, there are possible alternatives now which did not exist before. Larger school units employing special personnel, Regional Offices of education nearer to local authorities, and educational television are all available as means by which educational services can be delivered to most of those who are at present enrolled in correspondence courses. Since these agencies are already in existence, assumption of responsibilities for educational programs for those now taking correspondence courses would not be onerous or costly. It might mean that the Ministry would have to assist these agencies financially to a limited extent. In any case, that assistance would not approach the level of expenditure now made by the Correspondence Courses Branch.

Because of the location of the Branch at 909 Yonge Street, Toronto, in a high-cost rental area, the expenditure for accommodation for staff and operational facilities is substantial. Since the work of the Branch is conducted largely by mail, there seems to be no reason why its offices could not be located in an area other than in downtown Toronto. There is even a question about whether the Branch needs to be in the Metropolitan Toronto area at all.

From an organizational standpoint, there is little or no reason why the

Correspondence Courses Section should be included in the Special Education Branch of the Ministry, given the special interests and concerns of that Branch for the exceptional child.

All three problems to which reference has been made could be solved by discontinuance of the Correspondence Courses Section. While there would have to be some necessary adjustments, these are in our view relatively simple and easily manageable. There would be no instructional loss and there might even be substantial educational gains where students had the advantage of direct interaction with teachers instead of the impersonal written word. Financially, there could be savings of substantial amounts. It is not too often that it is possible to suffer no educational loss or even make a gain while achieving a financial saving. It is our conviction that these objectives can be realized, in large part, by a substantial reduction of the activities of the Correspondence Courses Section.

(d) Teacher Education and Certification Branch

Staff

The Branch is administered by a Director supported by an administrative assistant and five Educational Officers. In the latter part of the 1960s, the Branch had responsibility for the overall administration of thirteen teachers' Colleges, then operated by the Department of Education, and for liaison with the Colleges of Education which trained secondary school teachers but which were associated with the universities on whose campuses they were situated. A considerable proportion of the time of officials of the Branch was devoted to the planning and development of new teacher education institutions. These responsibilities were carried out by a Director and two officials.

Over the last decade the Teachers' Colleges in Thunder Bay (Lakehead), Windsor, Ottawa (University of Ottawa), North Bay, Sudbury, Ottawa, London, Toronto (Lakeshore) and St. Catharines have been transferred to the universities. As a result, officials of the Ministry of Education no longer have any responsibility for the administration of these institutions. The teachers' Colleges in Stratford and Peterborough

have been closed. Only the Ontario Teacher Education College with campuses in Toronto and Hamilton remains with the Ministry of Education. Many of the functions formerly performed by personnel of the then Department of Education are no longer required. The main duties they have to perform in relation to the faculties of education are of a liaison nature. The Branch does, however, administer summer courses and school-board-sponsored winter courses for Ministry of Education credit.

In spite of an overall substantial reduction in administrative functions and responsibilities, the Branch now employs six senior educational officers and an administrative assistant. Even allowing for involvement in activities not formerly performed by the Branch, it is our view that the Teacher Education and Certification Branch is grossly overstaffed at the official level and that substantial economies could be achieved by reduction in complement to a level consistent with performance of the liaison function. The comparative enrolments in teacher education programs are given in Table 29.

(i) Professional Summer Courses for Teachers

During the summer, the Ministry of Education conducts a substantial number of professional courses for teachers. Other professional courses are offered by the faculties of education. An annual publication¹⁴ is issued by the Ministry of Education listing and describing the courses offered by both organizations. The multiplicity of courses offered and the enrolment in each are shown in Table 30.

For many years professional summer courses sponsored by the then Department of Education attracted large enrolments. Teachers attended for a variety of reasons. The courses had a reputation for being highly practical, they enabled practising teachers to improve their qualifications by acquisition of a certificate supplementary to the teacher's basic professional certificate, almost every teacher who enrolled and attended the program was granted standing, and

¹⁴ Professional Summer Programs for Teachers, 1976, Ministry of Education, Ontario, March, 1976, pp. 18-19.

TABLE 29
ENROLMENT IN TEACHER EDUCATION
INSTITUTIONS
1970-71 to 1975-76^a

| Elementary | | | | | | | | | | | | | | | | |
|------------|-----------------------|---------------------|-----------------------------|---------------------------|---|--------------------------|-------------------|---------------------------------|----------------|-------------------------------|-----------------|------------------------------|-----------------|-----|---------------|-------|
| Year | OTEC Hamil- ton | Lake- head U. | Lake- shore York U. | London West- ern U. | North Bay Nipis- sing College | Ottawa Ot- tawa U. | Peter- borough | St. Cath- arines Brock U. | Strat- ford | Sudbury Lauren- tian U. | OTEC Toronto | Univer- sity of Ottawa | Windsor | | Queen's U. | Total |
| | | | | | | | | | | | | | Wind- sor U. | U. | | |
| 1970-71 | 827 | 212 | 864 | 657 | 392 | 840 | 356 | 322 | 345 | 192 | 1,857 | 281 | 426 | - | - | 7,571 |
| 1971-72 | 439 | 136 | 497 | 355 | 170 | 311 | 136 | 118 | 182 | 201 | 1,263 | 195 | 193 | - | - | 4,196 |
| 1972-73 | 335 | 109 | 414 | 266 | 135 | 231 | 118 | 199 | 121 | 85 | 791 | 143 | 192 | - | - | 3,139 |
| 1973-74 | 253 | 46 | 207 | 213 | 51 | 124 | - | 137 | - | 73 | 343 | 86 | 144 | 103 | - | 1,780 |
| 1974-75 | 306 | 43 | 176 | 337 | 101 | 162 | - | 154 | - | 108 | 461 | 100 | 166 | 115 | - | 2,229 |
| 1975-76 | 506 | 62 | 59 | 456 | 141 | 210 | - | 269 | - | 116 | 1,037 | 64 | 301 | 142 | - | 3,363 |
| Secondary | | | | | | | | | | | | | | | | |
| Year | Lake- head U. | York U. | U. of Western Ontario | Brock U. | U. of Toronto | U. of Ottawa | Windsor | Total | | | | | | | | |
| | | | | | | | | | | | | | | | | |
| 1970-71 | 105 | - | 764 | - | 1,475 | 113 | - | 2,790 | | | | | | | | |
| 1971-72 | 168 | - | 762 | - | 1,455 | 117 | - | 3,133 | | | | | | | | |
| 1972-73 | 113 | - | 733 | - | 1,553 | 125 | - | 3,246 | | | | | | | | |
| 1973-74 | 100 | - | 637 | - | 1,491 | 118 | 96 | 3,036 | | | | | | | | |
| 1974-75 | 102 | 5 | 744 | 40 | 1,840 | 88 | 70 | 3,512 | | | | | | | | |
| 1975-76 | 135 | 40 | 728 | 47 | 1,936 | 106 | 132 | 3,799 | | | | | | | | |

Source: Reports of the Minister of Education.

Notes: ^aAt October 15 each year

TABLE 30

MINISTRY OF EDUCATION
SUMMER COURSES FOR TEACHERS

1965-1975

| Course | 1965 | 1966 | 1967 | 1968 | 1969 | 1970 | 1971 | 1972 | 1973 | 1974 | 1975 |
|--|-------|-------|-------|-------|-------|-------|-------|-------|------|------|------|
| Art | 1,575 | 1,753 | 1,387 | 1,687 | 1,621 | 1,581 | 1,402 | 1,493 | 953 | 585 | 384 |
| Art et Science du Langue | - | - | - | 105 | 76 | - | - | - | - | - | - |
| Business and Commercial | - | - | 160 | 140 | - | - | - | - | - | - | - |
| Chassis Dynamometer | - | - | 11 | - | - | - | - | - | - | 25 | - |
| Childhood Education - Britain | - | - | - | - | - | 24 | - | 25 | - | 41 | - |
| Classics Seminar | - | - | - | - | - | - | - | 37 | 23 | - | - |
| Community School Development | - | - | - | - | - | - | - | - | - | - | 43 |
| Community Schools Workshop | - | - | - | - | 91 | 43 | 59 | - | - | - | - |
| Compensatory Education | - | - | - | - | 49 | 35 | - | - | - | - | - |
| Dance | - | - | - | - | - | - | - | - | - | - | 73 |
| Driver Education | - | - | - | - | - | - | - | - | - | 64 | - |
| Elementary Mathematics, Grades 1-6 | - | 1,765 | 1,353 | 1,029 | - | - | - | 79 | 142 | - | - |
| Elementary School Librarians | 282 | 359 | 582 | 380 | 928 | 931 | 816 | 752 | 587 | 429 | 728 |
| Elementary School Principals | - | 234 | 232 | 171 | 310 | 297 | 605 | 687 | 536 | 544 | 565 |
| Elementary Science | - | - | 216 | 575 | 680 | 320 | 341 | 210 | 45 | - | - |
| Elementary Social Studies | - | - | - | 310 | 196 | 438 | 263 | 257 | 52 | - | 20 |
| Environmental Field Studies | - | - | - | - | - | 31 | - | - | - | 131 | - |
| Family Studies Seminar | - | - | - | - | - | 34 | - | - | - | - | - |
| Fundamentals of ETV | - | - | - | 54 | 51 | - | - | - | - | - | - |
| Grade 13 Subjects | 49 | - | - | - | - | - | - | - | - | - | - |
| Guidance | 1,155 | 1,078 | 1,144 | 1,246 | 1,343 | 1,441 | 25 | - | - | 88 | - |
| Heads of Departments | 361 | - | 354 | - | 414 | - | 317 | - | - | - | - |
| Industrial Arts | 144 | 148 | 146 | - | - | - | - | - | - | 33 | - |
| Informatics Seminar | - | - | - | - | - | - | - | - | - | 63 | - |
| Integrated Arts | - | - | - | - | - | - | - | - | - | 37 | - |
| Integrated Studies | - | - | - | - | 662 | 787 | 537 | 200 | 54 | - | - |
| Intermediate Education, Grades 7 and 8 | 97 | 62 | - | - | - | - | - | - | - | - | - |
| Intermediate Geography and History, Grades 7 and 8 | - | - | 128 | 98 | 105 | 38 | - | - | - | - | - |
| Intermediate Mathematics, Grades 7 and 8 | 800 | 136 | 93 | 126 | - | - | - | - | - | - | - |
| Intermediate Mathematics, Grades 9 and 10 | - | - | - | - | - | - | - | - | - | - | - |
| Intermediate Science, Grades 7 and 8 | - | - | - | - | - | - | - | - | - | - | - |
| Junior Education | 166 | 595 | 205 | 102 | - | - | 79 | - | -- | - | 46 |

Source: Education Statistics Ontario, 1974, Ministry of Education, Ontario, Toronto, 1975 pp. 70-71.

TABLE 30 (Continued)

MINISTRY OF EDUCATION

SUMMER COURSES FOR TEACHERS

1965-1975

| Course | 1965 | 1966 | 1967 | 1968 | 1969 | 1970 | 1971 | 1972 | 1973 | 1974 | 1975 |
|--|--------|--------|--------|--------|--------|--------|--------|-------|-------|-------|-------|
| Junior Environmental Studies | - | - | - | - | - | 67 | 67 | 73 | - | - | - |
| Language Arts | 96 | 101 | 120 | 277 | 327 | 382 | 370 | 185 | 59 | 42 | - |
| Leadership Seminar | - | - | - | - | - | - | - | - | - | 42 | - |
| Learning Materials Management | - | - | - | 33 | 10 | - | - | - | - | - | 149 |
| Learning Materials Methodology | 776 | 701 | 844 | 670 | 608 | 482 | 319 | 190 | 72 | - | - |
| Mathematics, Grade 11 | - | - | - | - | - | - | - | - | - | - | - |
| Mathematics, Grades 11 and 12 | 202 | - | - | - | - | - | - | - | - | - | - |
| Mathematics, Grade 13 | - | - | - | - | - | - | - | - | - | - | - |
| Metrication Seminar | - | 171 | 13 | - | - | - | - | - | - | - | - |
| Music, Instrumental | - | - | - | - | - | - | - | - | - | - | - |
| Music, Vocal | 240 | 276 | 269 | 284 | 221 | 253 | 256 | 220 | 130 | 154 | 104 |
| New Horizons for Young Children | 545 | 536 | 467 | 510 | 532 | 485 | 534 | 332 | 228 | 218 | 166 |
| Physical and Health Education, Type B | - | - | - | - | 75 | 63 | 21 | - | - | - | - |
| Primary Education, Supervisors | 1,331 | 1,382 | 1,389 | 1,503 | 1,441 | 1,330 | - | - | - | - | - |
| Primary-Junior Curriculum Design | 98 | 115 | 113 | 112 | 104 | 165 | 103 | 95 | 85 | 81 | 115 |
| Primary Methods | 1,895 | 1,583 | 1,717 | 1,737 | 1,879 | 1,722 | 1,530 | 1,434 | 835 | 761 | 640 |
| Reading | - | - | - | - | - | - | - | - | - | - | 367 |
| Remedial Mathematics | - | - | - | - | - | - | - | - | - | - | 30 |
| Science Field Studies | - | - | - | - | - | - | - | - | - | - | - |
| School Attendance Counsellors | - | - | - | - | 31 | - | - | - | - | - | - |
| Secondary School Principals | 264 | 238 | 324 | 315 | 344 | 398 | 404 | 1,113 | 383 | 433 | 350 |
| Séminaire sur la pédagogie de la métirisation | - | - | - | - | - | - | - | - | - | 48 | - |
| Séminaire sur l'ÉJ-De la philosophie à la pratique | - | - | - | - | - | - | - | - | - | 28 | - |
| Space and Man | - | - | - | - | - | 29 | - | - | - | - | - |
| Special Education | 1,293 | 1,212 | 1,377 | 1,661 | 1,629 | 1,741 | 1,708 | 1,299 | 1,078 | 1,358 | 1,467 |
| English as a Second Language | 120 | 153 | 203 | 227 | 324 | 261 | 112 | 84 | 102 | 102 | 128 |
| Teaching the Deaf | 30 | 62 | 76 | 48 | - | - | - | - | - | - | - |
| French for English-Speaking Pupils | - | - | - | - | - | - | - | - | - | - | - |
| Regular | 151 | 116 | 88 | 153 | 194 | 116 | 110 | 100 | 43 | 56 | 54 |
| Special | 156 | 97 | 129 | 198 | 168 | 103 | 38 | - | 39 | 17 | 20 |
| Intensive | - | 154 | 114 | 132 | 106 | 93 | 115 | 85 | 93 | 69 | 75 |
| Teaching Native Children | - | - | - | - | - | 49 | 44 | 21 | 40 | - | - |
| Teaching the Trainable Retarded | - | - | - | - | - | 180 | 168 | 183 | 154 | 155 | 128 |
| TOTALS | 11,826 | 13,027 | 13,629 | 14,628 | 14,807 | 13,919 | 10,343 | 9,154 | 5,733 | 5,653 | 5,695 |

Source: Education Statistics Ontario, 1974, Ministry of Education, Ontario, Toronto, 1975 pp. 70-71

possession of the certificate often resulted in an additional allowance on the teacher's salary. At that time the Department of Education administered all thirteen elementary teacher education institutions in the province. It was natural, therefore, that it should conduct professional summer session courses as well. In any case, there was no alternative available.

The creation of the faculties of education and the requirement of a Bachelor of Arts degree or its equivalent as the basic academic requirement for certification have changed the situation completely. The faculties of education are capable of conducting professional summer courses and are already engaged in these activities in a number of subject areas. In many cases they already have on their staffs during the academic year highly qualified personnel who could also teach during the summer session. In addition, they already have an administrative organization which could plan and conduct the summer program. In the case of the Ministry of Education senior officials are engaged in the detailed work involved in the organization of summer courses, in the recruitment of staff, frequently from among members of faculties of education in the province. They must secure instructional space and arrange for the availability of living accommodation for students and staff. Often these arrangements have to be made with the universities for use of their facilities. They must process the large number of applications that are received. They must administer the programs in the summer. There is, therefore, an unnecessary and costly duplication on the part of the Ministry which could be eliminated by transfer of the conduct of summer courses to the faculties of education.

There should also be some financial saving to be realized by withdrawal of the Ministry of Education from the provision of summer courses. In any determination of the comparative costs of offering summer courses by the Ministry or by the faculties of education, it is necessary for the Ministry to include its "hidden costs" represented by the salaries of senior officials, secretaries, and support staff of the Ministry who devote part of their time to the planning and administration of the summer programs. Other expenditures for travel and living expenses,

instructional accommodation, and supplies and equipment must also be included.

If the transfer were made, it would not mean that the Ministry of Education should no longer be involved in the determination of courses to be conducted and the centres where they would be offered. Indeed, the Ministry's knowledge of the needs of the school system would mean that it could suggest appropriate courses to meet those needs. The Ministry would then be fulfilling its liaison role instead of being, in effect, in competition with the faculties of education in the teacher education field. For example, several years ago responsibility for summer courses in Guidance was transferred to the faculties of education and they are now conducting them. But in the summer of 1975, the Ministry of Education provided four seminars and workshops in Guidance, two of which required the Specialist Certificate in Guidance for admission. Instead of offering the short courses itself, the Ministry might have encouraged the faculties of education to undertake these programs.

The fact that almost all new entrants to the profession must now have the Bachelor of Arts degree or its equivalent has changed the situation considerably. No longer will beginning teachers spend several years acquiring the basic degree. Their initial academic background will result in more and more of them seeking a graduate degree at the Master of Arts or Master of Education levels. It is unlikely that they will be satisfied with the so-called "how-to-do-it" courses offered by successful practitioners unsupported by an adequate theoretical background in research and the literature. The new teacher is going to want to know the "why" as well as the "how" for his or her professional performance.

(ii) Principals' Course

The Ministry of Education conducts summer courses leading to certification as a principal. Attendance at one four-week course is required for the Interim Elementary School Principal's Certificate or the Interim Secondary School Principal's Certificate, Type B. A second four-week summer session is required for the Interim Secondary School Principal's Certificate, Type A. The requirements for admission to these

courses are determined by the Ministry of Education. The objectives of the Principals' Course are stated as follows:

- "(a) To develop a better understanding of the role of the principal in relation to the Ministry of Education, the school board, the staff, the students, the community, professional colleagues, and society;
- (b) To develop a better understanding of the effect of different styles of leadership on staff, children, and others;
- (c) To develop a better understanding of the process of curriculum development, implementation, and evaluation;
- (d) To develop increased skill in identifying and utilizing school and community resources."¹⁵

The objectives outlined are inherent in almost any graduate program at the Master of Education level in an Ontario university. It is true, however, that the Master's program involves more than a one-summer or two-summer, four-week course or courses. Again, however, it is essential that a professional leader occupying the position of principal in any school system should have a broad background of educational theory and practice and should be highly knowledgeable about the political, economic, social and cultural aspects of the society in which his school functions. That the Principal's Certificate is seen merely as a paper qualification opening the door to the possibility of administrative promotion is shown by the fact that in 1975 a total of 565 applicants were enrolled in the one four-week session leading to the Interim Elementary School Principal's Certificate and that an additional 350 were enrolled in the two sessions leading to the Interim Secondary School Principal's Certificate, Type B and Type A. In the latter case, there were enough principals taking the courses in one summer to provide a principal for 57 per cent of the 611 secondary schools of the province. The unfortunate aspect of this practice is that there will be so many holding the Secondary School Principal's Certificate that it will become almost meaningless, particularly in the light of the fact that with the inevitability of declining enrolments there will be a relatively small number of vacancies to be filled. It would be prefer-

¹⁵ Professional Summer Programs for Teachers, 1976, op. cit., p. 18.

able, therefore, if the Ministry of Education recognized the new circumstances and required as a minimum qualification for the position of principal a Master of Education degree. The Ministry might still wish to add other evidence of suitability for the role of principal before it granted its Principal's Certificate. Unless this is done, it is inevitable that many staff members in the schools are going to hold professional qualifications superior to those required of the principal who is expected to fulfill the leadership role.

Again, if the Ministry transfers to the graduate schools responsibility for the professional courses for the Principal's Certificate it will fill its liaison function while still maintaining its responsibility for certification. In that way it would also establish its own leadership function rather than being directly involved in the conduct of courses which the graduate schools are established to provide.

There are other examples of the unnecessary involvement of the Ministry of Education in the provision of summer courses. For example, during the summer of 1976, the Ministry will offer "French Conversation - Intensive Summer Course (CIFO)" at King's Hall, a private school in Compton, Quebec.¹⁶ The Faculty of Education, Queen's University, Kingston, will offer "French Conversation - Intensive Summer Course" for the same period of time in Kingston and Quebec City.¹⁷ Successful completion of either course results in certification by the Ministry of Education, the first receiving the Certificate in Oral French and the second either the Certificate as Teacher of French to English-speaking Pupils or the Temporary Certificate as Teacher of French to English-speaking Pupils. The courses offered by Queen's University are considered acceptable for certification so that it is difficult to understand why the Ministry would wish to be involved in offering courses itself rather than working out an arrangement with a faculty of education to assume responsibility for conducting its course.

¹⁶ Ibid, p. 12.

¹⁷ Ibid, p. 36.

Relationship with Faculty of Education

Only recently the Ministry of Education has established committees, representative of the Ministry and other educational agencies and organizations, to conduct periodic visitations to faculties of education to assess the programs offered by the faculties. There are a number of questions raised by this procedure. When Teachers' Colleges were operated by the then Department of Education, they were subject to inspection visits by senior officials of the Teacher Education Branch who had had many years' experience in the schools, in administration, and as members of the staffs of Teachers' Colleges. In spite of their best efforts, the Colleges could never claim to be innovative, creative institutions in the preparation of teachers. Indeed, it was because of dissatisfaction with teacher education in the Colleges that led to the appointment in the mid-1960s, of the Minister's Committee on the Training of Elementary School Teachers.¹⁸ In the light of that experience, it is difficult to understand how a committee, which visits a faculty of education for only a few days, can assess the quality of the program and offer constructive advice to faculty members.

No matter how the committee may be designated to minimize the resentment of the professorial staff, the visits of this outside body represent a form of "inspection". Several possible difficulties can arise. First, the staff of the faculty of education may not take seriously recommendations of the visitation committee because of a lack of confidence of the staff in the qualifications of the members of the committee to make judgments in the area of teacher education. If this occurs, the procedure becomes a charade to leave the impression with the public that there is some outside "control" over teacher education programs with the objective of improving them.

The second danger is that the faculty of education will take seriously and endeavour to implement procedures and practices proposed by the visitation committee. If this occurs, programs could be seriously hampered and even stultified within limits represented by the perceptions and personal experience of the committee members, in most cases unencumbered by the expertise

¹⁸ MacLeod, C.R., (Chm), Report of The Minister's Committee on The Training of Elementary School Teachers 1966, Ontario Department of Education, Toronto, 1966.

represented by the staff of the faculty of education.

A third consideration is the view that members of other faculties of the university have of a faculty of education which is subject to periodic assessment by a visitation committee, particularly when it is sponsored by government. Questions are bound to arise about academic freedom, professional competence, and institutional autonomy. These are legitimate concerns that should be taken seriously.

There is still a need to provide a means by which consultation can take place between members of faculties of education and the society which receives the graduates of teacher education institutions. The Ministry of Education has a prime responsibility in this area. It is our view that the Ministry's function can best be performed through the maintenance of a liaison role between the Teacher Education and Certification Branch and the faculties of education. But "liaison" should not imply control or direction, either overt or subtle. The latter route has already demonstrated its inadequacies. Rather, liaison should involve encouragement of well-designed experimentation, assistance in implementation of promising innovative programs, and support for creative approaches to the provision of better teacher preparation. Faculties of education, either individually or collectively, should on their own initiative actively seek out the views of professional teacher organizations, trustee groups, administrative officials, school boards, home and school associations, and other representative bodies about the performance of their graduates. They should then give serious consideration to these views and respond to them in the light of their professional knowledge and expertise. The important point is that those responsible for the conduct of teacher education seek help and advice from the society, that they respond to justified suggestions and criticisms, that they decide in the light of their professional competence the changes to be implemented, and that they be held responsible for those decisions.

Education Administration Division

In the proposed plan of reorganization in 1972, the stated function of the Education Administration Division was to enable the Ministry of Education to "ensure the development and maintenance of a school system in the Province

which is responsive to the needs of individuals as members of a larger society, and to the Ministry's standard of equality and quality of education. Therefore, it is essential that there be a highly responsive linkage between the various levels of the educational system - from the Minister to the student. Education Administration is the function which would provide this linkage - to oversee effective program delivery and policy implementation."

"School boards have been established to carry out the direct responsibility for delivery of educational services and the prime responsibility of the Education Administration function is to support and improve the operation of school boards through the provision of necessary resources, advice and guidance and, while at the same time, applying the necessary evaluation mechanisms to ensure approved provincial standards are being met.

This Division will, therefore, consist of the Regional Offices and three supporting central branches: Curriculum Services, Supervisory Services, and School Grants and Finance."¹⁹

Actually, when the Education Administration Division was finally organized, it consisted of the Curriculum Services Branch, the Supervisory Services Branch, the School Business and Finance Branch, and a fourth designated the Education Exchange Branch.

(a) Curriculum Services Branch

The Curriculum Services Branch was established as a result of the reorganization in 1972. Its stated purposes at that time were to "interpret curriculum guidelines, to assist teachers and administrators in the development of education programs, to seek to improve teaching and school programs, and to obtain reactions from the field in connection with program policy. The Curriculum Services Branch should be distinguished from the Curriculum Development Branch. The latter may be said to originate curriculum, but the former is charged

¹⁹ Ontario Department of Education: A Proposed Plan of Organization, March, 1972, (Mimeographed), 1972, p. 8.

with implementing it."²⁰ The new Branch had four major groups in its original organization - Curriculum Guideline Services Committee, Cyclic Review Liaison Services Committee, Professional Development Services Committee, and Regional Support Services Committee. The first Director expressed the function of the Branch in these words:

"Although we're in an embryonic state, we are convinced that you cannot divorce development from implementation. When you get down to essentials, we are the chain that links the Ministry to our regional offices, acting as a vehicle to maintain a two-way flow of communication."²¹

Effective September 1, 1974, a revised organizational pattern for the Branch was implemented. Three sections were established - Program Review, Professional Development, and Program Services - each coordinated by a permanently appointed Chief Educational Officer. A fourth unit is the Community Schools Section.

The Branch began operation with 26 Education Officers and 22 secretarial and administrative personnel in the curriculum area. Subsequently, another 11 clerical staff for the Learning Materials Services unit were phased out of the Branch. Approximately 22 Education Officers made up the professional staff complement in 1976. The budget in 1972-73 was \$3,711,400. In 1976-77, the estimated expenditures of the Branch total \$3,155,100, a decrease of \$488,600, or 13 per cent, from the amount of \$3,643,700 allocated in 1975-76.

The basic difficulty in assessing the role of the Curriculum Services Branch is the concept of curriculum development, implementation, and evaluation that it represents. Under the organization of the Ministry of Education, curriculum development is assigned to a branch in the Education Development Division. Curriculum implementation is allocated to this separate Curriculum Services Branch in another division - Education Administration Division. Curriculum evaluation is the responsibility, at least in part, of the Supervisory Services Branch in

²⁰The Role and Structure of the Ministry of Education, Ontario, op. cit., p. 24.

²¹Ministry of Education News, August, 1972, pp. 1 and 3.

the Education Administration Division through the Service for Co-operative Evaluation of School Systems.²² These organizational arrangements are inconsistent with the concept that all of these activities are part of a totality involving assessment of needs, establishment of goals, ordering of priorities, development of programs, selection of program, determination of objectives, implementation of program, evaluation of performance and outcomes, and redefinition of goals, and so on. Much of the professional literature supports the conclusion that the same professional personnel should be involved at all stages of the process, with participation of parents, students, trustees, representatives of interested organizations, and the community at appropriate stages where they can make their most significant contributions. While this broad range of representation in curriculum development, implementation, and evaluation is not easily attainable at the provincial level, it is essential that the professional educators responsible for all phases of curriculum development in the central offices of the Ministry be in the same branch and division. The existing fragmentation is not conducive to sound curriculum work.

There are a number of problems that have their origin in the present organizational structure. For example, there is a need for the professional educators in the Curriculum Development Branch to know what problems arise in implementation of the curriculum guidelines that they have produced. They also need to know how effective these guidelines have been. For the most part, they have to secure this information through liaison with the Curriculum Services Branch and the Supervisory Services Branch. This requires a high degree of cooperation among these units, a difficult problem in itself. Even with the greatest goodwill on the part of all concerned much of value in terms of understanding is lost in the transmittal process when compared with the learnings that those in the Curriculum Development Branch would achieve if they were directly involved in implementation and evaluation of the guidelines.

From the standpoint of the Curriculum Services Branch, the professional

²²Service for Co-operative Evaluation of School Systems, Supervisory Services Branch, Ministry of Education, Ontario, Toronto, February, 1973.

educators are required to interpret and attempt to implement curriculum guidelines developed by other people. Again, they can never be as knowledgeable about the goals, objectives, and intent of the guidelines as if they had participated fully in the development process. Another result is that they can hardly have the commitment to the guidelines that the people in the Curriculum Development Branch have.

The personnel in the Supervisory Services Branch, in so far as they may be involved in the evaluation of the results of the guidelines and their implementation, are in an even less tenable position. They not only lack full understanding of the goals, objectives, and intent but they are likely to be unaware of the multiplicity of circumstances that prevailed in the communities where the guidelines were implemented and of the techniques and methods that were used in the implementation process. The result is that they are likely to fall back on their own criteria as a basis for judgment of the success or failure of a program. This type of evaluation can be disastrous for improvement in education and for attempts to be creative, innovative and imaginative in the development of new approaches to the solution of persistent problems in education. What claims may be made in the name of objectivity for this type of evaluation, they must be tempered by the fact that they are all too often based on a degree of lack of understanding of the original purposes of the program, on a relative unawareness of the circumstances involved in the implementation process, and on criteria that may have little applicability to the intent of the revised guideline.

All of these difficulties can be overcome, or at least minimized, if the same people are involved in the process from beginning to end. It is our view, therefore, that the Curriculum Services Branch should be abolished. The responsibilities it now has should be incorporated in a Curriculum Branch without the word "Development" in its title. We shall have further comments about the involvement of the Supervisory Services Branch in the evaluation of curriculum activities in the section of the Report dealing with that Branch.

Abolition of the Curriculum Services Branch should result in substan-

tial financial savings. As has already been pointed out, the estimated expenditures for this Branch in 1976-77 total \$3,155,100. The comparable figure for the Curriculum Development Branch is \$4,751,800. The combined total is \$7,906,900. If all the staff - professional, secretarial, clerical and other support personnel - in the Curriculum Development Branch and the Curriculum Services Branch are incorporated into the proposed Curriculum Branch, it will then be possible to select those necessary and best able to perform the functions assigned the Curriculum Branch. While it cannot be assumed that a number of staff equivalent to either the number in former Curriculum Services Branch or in the Curriculum Development Branch will no longer be necessary, neither should it be assumed that a number equivalent to the total of the two former branches will be required. The total number of Education Officers in the two branches is now approximately 40, with about 20 in each Branch. It is our view that these numbers represent extreme overstaffing in this area at the central office of the Ministry and that the number should be substantially reduced with a corresponding reduction in the number of support personnel.

There are other advantages to be gained by a substantial reduction in the number of staff in the curriculum area at the central office of the Ministry. Greater decentralization of work can take place through the involvement of curriculum personnel in the Regional Offices in the development of new guidelines for the province. These same people would then go back into the field to act as resource personnel in the implementation and evaluation process to be carried out by school boards. This pattern would largely overcome the criticism of the fragmentation of responsibility and involvement made earlier. In recent years there has been some suggestion that economies in spending on education might be achieved through reduction in the number of staff in the Regional Offices of the Ministry. A more logical way to achieve economies and to maintain the principle of decentralization is to reduce the unnecessary staff at the central office level. No where is this possibility greater than in the Curriculum Services Branch and the Curriculum Development Branch.

(b) Educational Exchange and Special Projects Branch

The Educational Exchange and Special Projects Branch came into existence in April, 1972. incorporating several small units from other parts of the then Department of Education. Its function was to assume responsibility for the development, implementation, and administration of the cultural and educational exchange programs for teachers, students and Ministry personnel; for the provision of student leadership programs; and for planning study tours for visiting educational officials. Its activities are identified under the following names: Young Voyageur Program, Educational Exchange Programs, Youth Leadership Programs, School Twinning Programs, Young Travellers Program, Teacher Exchange Program, and Educational Exchange Programs.

In 1976-77, the budget for the Branch totals \$1,573,100, with \$319,000 of this amount to be expended on Programs of Educational Exchange and \$504,000 on the Ontario Young Travellers Program. The balance of \$750,100 is for the administration of the Branch.

There is little doubt that programs administered by the Branch make a significant contribution to the education of students who participate. From the standpoint of costs, a question arises about the necessity to have one person in charge of each particular program. It appears that in some cases one official might administer more than one program, given the spread in the time of year that the greatest activity takes place and the considerable period of the year available for planning activities and processing applications. While it is undoubtedly true that professional educational expertise is necessary in some programs, for example in Youth Leadership Programs, it is also true that others require little or no professional background. It would seem unnecessary to designate educators of high professional competence and extensive academic and professional preparation to administer exchange programs involving the detailed planning of arrangements for travel, accommodation, and the like. This does not seem to be the best use of personnel resources either from the standpoint of the professional interest of the employee or from the best contribution he or she can make to the work of the Ministry. At the same time, it seems wasteful to

pay salaries at the level of outstanding professional educators for jobs that might be performed by persons with some clerical competence.

(c) School Business and Finance Branch

The functions of the School Business and Finance Branch include provision of guidance and direction to local school authorities in connection with capital and operating expenditures and revenues, in part through the school business and finance staffs of the Regional Offices; development and administration of programs for the distribution of Provincial financial support to school boards; revision, with the advice of the Grants Committee, of the General Legislative Grant Regulation; establishment of standards of financial reporting and enforcement of compliance with these standards; development of comparable data for all school boards; and provision of advice and guidance to school boards, Ministry officials, and others in the interpretation of Acts, Regulations, and procedures that relate to school business and finance matters.

The Branch has a special group of advisers in the general area of school business and finance and two specialized units - the Architectural Services Section and the Grants Services Section. The general area has responsibility for program administration and coordination of the work of the school business and finance officials in the nine Regional Offices with the central office of the Ministry.

The Architectural Services Section consults with school boards regarding capital expenditures for school sites and new school buildings and conducts inspection of existing buildings for possible renovation and replacement. It considers applications from school boards for approval of capital projects and comments on drawings, specifications, and plans for school buildings. The Branch conducts Research studies into school construction, prepares brochures and reports, monitors school construction costs and recommends adjustments in the Capital Grant Plan to meet changing circumstances.

The organization to administer the school building program in Ontario

was built up during the rapid expansion period of the 1950s and 1960s. Since the enrolment began to decline in 1971, there has been a diminishing need for school construction.²³ Since the fall of 1975, there has been a virtual moratorium on approvals of new school building projects. On the basis of essential need and unavailability of financial resources, it would seem that the commitment of funds by the Ministry for construction of school buildings will continue to be limited. Consequently, the Ministry should ensure that the number of staff in the Architectural Services Section is limited to the number required to meet the decreased demand for services.

The Grants Services Section administers program of transfer payments from the province to school boards. The amount included in the estimates for this activity in the fiscal year 1976-77 is \$1,714,649,300. On the surface it would seem that the magnitude of this figure would require an elaborate organizational structure and a large number of staff. However, the total budget for the operation of the whole Branch in 1976-77 is \$1,418,300. A relatively small proportion of this sum is allocated to the operation of the Grants Services Section.

There are a number of factors that account for the small staff necessary to distribute the general legislative grants. The creation of the county and district school boards, effective January 1, 1969, reduced the number of school boards from approximately 1500 to about 200. The present number of boards is 194. Of the latter number, 77 are boards of education and 47 are County and District Combined Roman Catholic Separate School Boards for a total of 124. These are the large boards and they receive more than 90 per cent of the grants paid by the province. While the remaining boards number 70, most are units operating small schools with few classrooms. Some of the Department of National Defence schools are larger but the calculation of grants for these units is relatively simple. Consequently, the amount of work involved in the determination and payment of general legislative grants by the central office has been reduced to a minimum.

²³McEwan, T.A., (Chm.), School Building Programs, Interim Report Number Two, Committee on the Costs of Education, Toronto, October, 1972.

The Business and Finance officials in each of the nine Regional Offices assist in the processing of the annual financial reports of school boards. Each Regional Office has a small number of boards with which it has to deal. Because of the proximity of the Regional Office to the board jurisdictions in its area, there is opportunity for consultation between officials of the two units and for the development of understanding of the circumstances and conditions under which boards operate. In Southern Ontario the range of the number of boards in the six Regions is from 11 to 28 with the average about 14. In Northern Ontario, the range in the three Regions is from 28 to 36 with the average number being about 31. However, in the latter case, the average is higher because of the small units to which reference has already been made.

It is our view that the Regional Offices should be permitted to assume almost total responsibility for administration of legislative grants to school boards, subject only to confirmation by the central office. The central office of the Ministry should ensure that officials of boards consult with officials of Regional Offices on all matters relating to application of the General Legislative Grant Regulation. The central office should do nothing that would encourage its own involvement in this process. Officials of the central office should ensure through regular consultation with school business and finance officials of the Regional Offices that the latter are fully knowledgeable and competent to function in the manner proposed. If this procedure is followed, it should be possible to keep the number of staff at the central office at a minimum while enabling them to devote much of their time to research, analysis, and recommendations for improvement of policy regarding legislative grants.

(d) Supervisory Services Branch

The functions of the Supervisory Services Branch are numerous and diverse. They include "the design and implementation of a variety of evaluation systems for the use of school boards and the Minister, whereby the status of the educational enterprise can be determined at both the local and the Provincial levels. This activity will be

researched, designed and implemented through the use of the Task Force concept, which will bring together Ministry personnel representatives of the teachers, trustees and school officials of the publicly-supported school system. The evaluation objective will be met by the use of co-operative evaluation techniques, and will respect professional values and areas of responsibility of all elements of the Ontario educational community."²⁴

A second function is to "serve as a communication and liaison unit between the Provincial organizations of teachers, trustees and school officials and the Minister, and to co-ordinate, from the Ministry's point of view, inter-organizational relationship between the various provincial bodies."²⁵

Other functions are to act as the management agent in the certification of supervisory officers, and to serve as a liaison body with those universities providing professional development activities for supervisory officers at the pre-service and in-service levels; to provide a contact point between the Ministry and the public education system, in clarifying administrative problems, the generation of alternative solutions to those problems and submission of those proposals to decision of the appropriate authorities; to provide expert advice based on a wide knowledge of methods and functions of all aspects of school administration; and to coordinate the relationships between the Ministry and private schools."²⁶

The exercise of these functions is carried out by designation of staff to work in areas dealing with Evaluation Systems; Supervisory Officers; Trustees and School Boards; Principals, Teachers, Consultants; Private Schools; Section 12 (now Section 68) School Boards; Correctional Schools, Isolated Boards and the Northern Corps; School Attendance Counselling Function and Board Auxiliary Services; and French Language Supervisory Services.

²⁴The Role and Structure of the Ministry of Education, Ontario, op. cit., p. 32.

²⁵Ibid, p. 32.

²⁶Ibid, p. 32.

The Supervisory Services Branch has developed an organizational pattern for evaluation of school systems.²⁷ One aspect of the pattern is "Internal Evaluation," by which an evaluation of the school system's educational achievements is conducted by its own personnel. This step should be an integral part of every school system's operations and provision for it should be included in every program along with the criteria on which the evaluation will be made to determine the extent to which the goals are being realized. To the extent that encouragement of this type of assessment is given by the Supervisory Services Branch, its involvement is highly positive.

The Service for Co-operative Evaluation of School Systems, however, sets out a much greater degree of involvement for persons outside the school system and the individual school. This, too, can be helpful provided that the people working in the system or school recognize a need for help and assistance, not only in the development of their expertise in evaluation, but also in other phases of the cycle of improvement of the educational program at the needs assessment, priority setting, goals determination, program development and selection, and implementation stages. The workers in the system or school who identify their own needs should explore possible sources of assistance and should be permitted to select those whose expertise they wish to utilize. This procedure has a number of obvious positive features. It enables personnel in the system to improve their performance through a focus on the needs that they have identified; it encourages commitment of participants within the system to co-operate with those whom they have selected to help them; it is non-threatening to them in that the focus is on self-improvement; and for teachers, supervisors, administrators who are involved, it recognizes their professional competence and desire to improve.

The formal structure established by the Supervisory Services Branch has limitations and dangers in so far as improvement of the educational program or programs is concerned. It requires a formal resolution of

²⁷ Service for Co-operative Evaluation of School Systems, Supervisory Services Branch, Ministry of Education, Ontario, Toronto, February, 1973.

the board to participate in a co-operative evaluation exercise. This does not recognize that evaluation is an integral part of the total process of program improvement and, as such, should be inherent in every program instead of being isolated as a separate activity.

A second limitation is imposed by the method of selection of members of the External Team. These are chosen by the Ministry Project Coordinator in consultation with the Internal Committee. In practice, it is inevitable that at least some of those selected will not be known by the people within the system. These members will not be knowledgeable about the school system they are evaluating, let alone the communities in which the schools function. They will not be aware of the interplay of forces and personalities that often determine what is possible and realistic educationally. In large part, they will have to depend on written statements which all too often do not reflect adequately or accurately what is happening in a specific situation. Other limitations may exist in the abilities, insights and experience of the co-opted members. In the absence of better data and information, they are apt to judge the situation in terms of their own criteria which may lack relevance to the system or school they are evaluating.

As was pointed out in the part of this Report dealing with the Curriculum Development Branch and the Curriculum Services Branch the fragmentation of responsibility for curriculum among those two branches was undesirable and negative in its impact. The addition of the Supervisory Services Branch to that situation only compounds the difficulties. It is our view that the Curriculum Branch should have responsibility for all aspects of the instructional program in so far as the central office is concerned and that it should work in cooperation with curriculum personnel in the Regional Offices to assist school systems and schools to achieve their goals through the resource personnel available on request. The Supervisory Services Branch should, therefore, discontinue its involvement in evaluation of the curriculum and instructional program.

The other activities of the Supervisory Services Branch are largely

administrative in nature. As a matter of fact, it would seem more appropriate and less confusing if it were designated the Administrative Services Branch or the General Administrative Services Branch.

The amount included in the Estimates for the fiscal year 1976-77 for the Branch is \$863,200, a decrease of \$67,000 from the amount of \$930,200, for the fiscal year 1975-76.

Educational Resources Allocation System

"During November of 1971, the Ministry of Education announced the formation of a task force whose function would be to work, in co-operation with local school systems in Ontario, on the development and implementation of a resource allocation approach to educational decision-making. The announcement stated that the aim of the task force would not be the imposition of additional cost controls by the province, but to assist school boards to obtain, for their communities, the greatest benefit for every dollar spent through the optimum use of available educational resources."²⁸ The purposes and plans for the task force were elaborated on in a later publication.²⁹

In addition to the Task Force, made up of a Director and four Project Officers, provision was made for an Advisory Committee of 15 members, of whom five were members of the Steering Committee of the latter body. Both the Task Force and Advisory Committee were broadly representative of interested groups.

As part of its activities the Task Force issued a number of information sheets³⁰ and working papers.³¹ Towards the conclusion of its

²⁸ Educational Resources Allocation System Task Force, Ministry of Education Ontario, February, 1973, p. 2.

²⁹ Educational Resources Allocation System Task Force: An Initial Statement, Ministry of Education, Ontario, Revised Edition March, 1973.

³⁰ Educational Resources Allocation System Task Force Newsletter, (Memoographed), No. 1 to No. 9, March, 1973, to June, 1975, Ministry of Education, Ontario, Toronto.

³¹ Educational Resources Allocation System Task Force Working Paper, No. 1 to No. 8, September, 1973, to August, 1975.

activities in the latter part of 1975 and early 1976, the Task Force reported on its work in a series of four volumes.³²

The Educational Resources Allocation System for education in Ontario is based on the concept of Program Planning and Budgeting System adopted by the province for its own programs in 1969. The reasons given for the introduction of the systems approach to the province's activities were weaknesses identified in the approach generally followed until that time. "The most important of these were:

- (1) Vagueness of objectives;
- (2) Limited analysis of alternatives;
- (3) Partial costing of programs;
- (4) Inadequate consideration of future year implications of present decisions;
- (5) Short review and decision period;
- (6) Emphasis on expenditure control instead of performance;
- (7) Gap between planning, budgeting and control."³³

Some or all of these deficiencies could probably have been found in the operations of most school boards in Ontario prior to 1969. It is undoubtedly true that in 1969 these weaknesses were merely transferred to their successors, the new county and district units. Because of the other problems associated with the absorption of so many former units, it was not possible to overcome all the weaknesses immediately. However, the new boards from their inception began to place more emphasis on planning, particularly in administrative areas. In most cases, they had staff with the potential, but without the expertise, to implement programs designed to minimize the weaknesses identified.

The Program Planning and Budgeting System, from its initial development in the early 1960s, was adopted by many business, industry, and government agencies as a device to achieve more efficient management and better utilization of financial resources. Its applicability and usefulness in many of the operations of these organizations are now accepted. As has so often been the case in the past, proposals for

³² Educational Resources Allocation System Task Force, Ministry of Education, Toronto, August, 1975, Final Report (Four volumes).

³³ Effective Management Through PPBS, Province of Ontario, Toronto, October, 1969, p. 1.

greater efficiency in business have been transferred and applied to the educational enterprise.³⁴ The direct applications of P.P.B.S., under this name resulted in some resistance in other jurisdictions. Consequently, in Ontario, the name was changed to the Educational Resources Allocation System to avoid the negative connotations of P.P.B.S., but essentially the two are inseparable.

Some of the objections to the application of P.P.B.S., to education should be identified. In theory, the emphasis on planning priority-setting, allocation of financial resources, evaluation, and the like, were interpreted much more narrowly as an attempt to reduce costs regardless of the impact on education. The emphasis on "outcomes" and "outputs" when applied to the instructional program and the measurement of these in terms of behavioural objectives were highly suspect. Teachers saw this pattern in terms of assessment of their performance. They felt that comparisons would be made of the attainments of teachers and classes without adequate regard for the great number of variables represented by the abilities of pupils, socio-economics influences, parental and community expectations, educational leadership, personnel resources, and the like. Educators claimed that an emphasis would be placed on programs that were measurable to the detriment of other programs with objectives in the areas of creativity, values, and attitudes. It was claimed that P.P.B.S., while it might have applicability to enterprises where judgment of its success can be measured by reference to a balance sheet, could not be applied to the educational enterprise where the emphasis was on human beings and what happened to them.

The members of the Educational Resources Allocation System Task Force in Ontario were aware of the arguments against P.P.B.S., and attempted to take them into account in the development of their activities. They emphasized, as we have emphasized in our comments about curriculum development, that improvement of the educational program must be seen as a total process operating in a cyclical fashion.³⁵ To the extent that

³⁴ Callahan, R.E., Education and the Cult of Efficiency, The University of Chicago Press, Chicago, 1962.

³⁵ Educational Resources Allocation System Task Force, Newsletter No. 7, December, 1974.

the Task Force was able to direct attention to the necessity for planning, the assessment of needs, the identification of goals, the selection of priorities, development of programs, the setting of objectives, the determination of evaluative criteria, and the assessment of results as a basis for new planning, it made a contribution to the potential for improvement of education in Ontario. It is also undoubtedly true that some aspects of the educational enterprise, apart from the instructional program, lend themselves to utilization of the principles of P.P.B.S. These include operations and maintenance, business affairs, and transportation as examples.

But in the instructional area there are inherent weaknesses in P.P.B.S. Reference has already been made to some of these. As a theory, P.P.B.S., had some merit when applied to projects such as the construction of highways where the goals can be clearly identified, where the variables in implementation can be reduced to a minimum, where consistency is highly desirable, and where outcomes can be easily measured.

The relevancy of P.P.B.S., to situations involving services to humans is not nearly so evident. In the case of education, where there are a multiplicity of goals and objectives, where each student and each teacher is a variable, where flexibility and adaptability in method are essential, where variations in level of attainment of goals and objectives are inevitable, and where measurement of outcomes are at best inexact or dependent on evidence that will emerge at some time in the future, the applicability of P.P.B.S., is not only questionable but may even be detrimental to the provision of a desirable educational program.

One author has assessed the earlier application to American education of business and industrial values and practices by school administrators and has attempted to explain why they took those actions. He says:

"It seems in retrospect that, regardless of the motivation, the consequences for American education and American society were tragic. And when all of the strands in the story are woven together, it is clear that the essence of the tragedy was in adopting values and practices indiscriminately and applying them with little or no consideration of educational values or purposes. It was not that some of the ideas from the business world might not have been used

to advantage in educational administration, but that the wholesale adoption of the basic values, as well as the techniques of the business-industrial world, was a serious mistake in an institution whose primary purpose was the education of children. Perhaps the tragedy was not inherent in the borrowing from business and industry but only in the application. It is possible that if educators had sought 'the finest product at the lowest cost' - a dictum which is sometimes claimed to be a basic premise in American manufacturing - the results would not have been unfortunate. But the record shows that the emphasis was not at all on 'producing the finest product' but on the 'lowest cost'. In all of the efforts which were made to demonstrate efficiency, it was not evidence of the excellence of the 'product' which was presented, but data on per-pupil costs. This was so partly because of the difficulty of judging excellence but mostly because when school boards (and the American people generally) demanded efficiency they meant 'lower costs'."36

The estimates for the operation of the E.R.A.S., program for each of the fiscal years 1972-73 to 1975-76 inclusive showed a proposed expenditure slightly in excess of \$200,000 per year, for a total of more than \$800,000.

(e) Regional Services

The Regional Offices of the Ministry are the chief vehicle by which the Ministry provides services to school boards throughout the province. The creation of these offices in a number of centres was part of the reorganization of the then Department of Education in 1965. The first five offices were established on September 1, 1965, in Port Arthur, Sudbury, North Bay, London, and Waterloo, and it was indicated that the number of area offices would be increased progressively to embrace the entire Province.³⁷ A quotation from the Report of the Minister in 1965 sets out the purposes that it was expected the area offices would help to achieve.

"Another basic aim of the departmental reorganization was to achieve more efficient and effective operation within a streamlined structure. Decentralization is one of the methods by which this aim is being pursued."

.....
 "Once supervisory and administrative responsibility is centred in

³⁶Callahan, R.E., op. cit., p. 244.

³⁷Report of the Minister of Education, 1965, p. 12.

in organized areas covering the Province, a great variety of problems can be solved at the area level and the careful but quick decisions that are called for in the rapidly expanding and changing educational system of Ontario will be facilitated".³⁸

In 1966, additional area offices were established in St. Catharines, Toronto (2), Kingston, and Ottawa. Business administrators were appointed to seven of the ten area offices to assist local school boards, in matters relating to building programs, transportation, and grants. It was indicated that a business administrator would eventually be appointed to each area office.³⁹

The philosophy underlying the role of the Regional Offices was summed up in a memorandum⁴⁰ that incorporated the announcement on August 27, 1969, of changes in the relationships between and among the central office of the Department of Education, the Regional Offices, and school boards.

In a memorandum,⁴¹ under date of March 14, 1972, adoption of a reorganization of the Department of Education was announced. The memorandum contained the following paragraph:

"While the need to examine the role of the Regional offices was one of the primary motivating factors in the establishment of the Task Force, it has not been possible to complete this aspect of the study in the time allotted. It has been agreed, however, that this review should be completed with all expediency and, toward this end, members of the Task Force, supplemented by additional personnel to ensure a comprehensive examination, will begin this second and final phase of the study immediately".⁴²

³⁸ Ibid, pp. 11-12.

³⁹ Report of the Minister, 1966, pp. 7-8.

⁴⁰ Memorandum 1967-68: 10.

⁴¹ Memorandum to All Employees of the Department of Education Re Departmental Reorganization, Office of the Deputy Minister, Department of Education, Toronto, March 14, 1972.

⁴² Ibid, p. 1.

Under date of February, 1973, the Task Force on Organization submitted its Report.⁴³ This document contained detailed comments and recommendations on many matters, including the Regional Offices. Under date of November 16, 1973, a memorandum set out the Ministry's reaction to the Report and the changes it proposed to implement.

The memorandum stated that a "basic underlying principle of the reorganization is to give regional offices the authority to make effective decisions at the regional level which will more closely reflect the diverse needs of local school boards and the Ministry. To facilitate such decentralized decision-making, each regional office will be responsible for provincial policy delivery in elementary and secondary school education and for dealing with matters of operations and administration relative to local school jurisdictions."⁴⁴

This statement appears to give a commitment that the Regional Offices are to function in accordance with the principle of decentralization from the central office of the Ministry and that much of the decision-making in education will be made at the local level, as close as possible to those who will be affected by the decisions made.

There are, however, some other statements in the memorandum which are less than reassuring for the future of the Regional Offices. For example, it is stated that "it is recognized that the staffing of the new regional offices will be dislocating to some employees presently working in regional offices as program consultants. It is clear also that the type of budget design described later in this memorandum and the new mode of operation will reduce the staff of the present regional offices to a considerable degree over the next few years."⁴⁵ The "budget design" to which reference is made indicates that the "dollar amount allocated within the budget of the Ministry for regional services for 1973-74 will act as the absolute ceiling for the operation of the new regional offices over the next three to five years. There

⁴³Structure for Education Administration: The Report of the Task Force on Organization Ministry of Education, Ontario, February, 1973.

⁴⁴Ibid, p. 3.

⁴⁵Ibid, p. 5.

will be no increase in funds for regional services during that period. Any increases in costs resulting from inflation or other sources will be absorbed within the cost ceilings represented by the 1973-74 allocation."⁴⁶ While the need for economy in all aspects of the educational enterprise is unquestioned, the Regional Offices were the only unit in the whole Ministry in 1974-75 that was required to absorb inflationary and other cost increases within the budgetary limit of 1973-74. There may have been factors that convinced the Ministry of Education that expenditures for the Regional Offices were excessive in relation to the functions they were expected to perform, in which case any increase in budget could not be justified. Nevertheless, it is difficult to believe that this possibility existed only for the Regional Offices and that increases, some of them substantial, in 1974-75 over 1973-74 for almost all other aspects of the Ministry's operations were justified, while the budget for the Regional Offices remained static. The more likely interpretation for this action is that the Regional Offices not only had a lower priority but also that there was a desire to reduce their importance in relation to the units and activities of the central office of the Ministry. If this is so, it is hardly consistent with the rhetoric in favour of the Regional Offices and the decentralization principle.

In any case, the statement that the allocation of funds "for regional services for 1973-74 will act as the absolute ceiling for the operation of the new regional offices over the next three to five years" does not have regard for sound budgeting principles. It seems to indicate that, regardless of the impact on the program and without any further consideration of that impact for three to five years, the amount of money will not exceed the allocation in 1973-74. Again, this limitation was not applied to any other unit of the Ministry. Since the Regional Offices had just been reorganized and since there had not yet been any experience with the new organization, it is difficult to see how a rational decision about budgeting for three to five years could be made in advance and with the possibility of review already eliminated. In actual fact, however, the Ministry did not

⁴⁶Ibid, p. 5.

adhere strictly to its avowed intention since increases of \$369,800, or 3.4 per cent, and of \$113,900, or 1.0 per cent, were permitted in the fiscal years 1975-76 and 1976-77 respectively. Nevertheless, the singling out of the Regional Offices for special treatment in the control of expenditures gives some indication of the importance attached to these units.

Limitations on Effectiveness of the Regional Offices

When the Area Offices were established in 1965, they were the result of a genuine commitment to the concept of decentralization of a great deal of authority and responsibility from the central office of the then Department of Education to the local level. That policy continued to be reflected in decisions to have school boards assume responsibility for supervision of their own staffs, for development of curriculum, using guidelines prepared by the Ministry, and to provide personnel in the Area Offices to act as resources for school boards as they might be required. In more recent years, however, the commitment to decentralization, although supported in theory, has not been nearly so evident in practice.

There have been a number of factors that have placed limitations on the effectiveness of the Regional Offices and on their ability to fulfill their role more adequately as the decentralized arm of the Ministry of Education.

(i) Deployment of Staff

Effective operation of the Regional Offices presupposes that the functions assigned to these offices will be performed by them and that there will not be a duplication at the central office of the Ministry of personnel who are charged with all or part of the same responsibility. For example, the Curriculum Services Branch, with its large complement of Education Officers, is not only unnecessary but also a potential source of misunderstanding, not only between the Regional Offices and the central office of the Ministry but also in the minds of school boards, board officials, principals, and teachers. The

delivery of curriculum services is surely a function of the Regional Offices in their interface with local school authorities. Consequently, if the number of staff in the Regional Offices is unable to perform this function adequately, the answer does not lie in the existence of a central office counterpart in Curriculum Services but rather in the deployment of these staff to the Regional Offices to the extent that their number are required there and in the abolition of the central Curriculum Services Branch. Similar comments could be made about the number of staff in other branches of the central office of the Ministry. Consistent with the decentralization principle, the Ministry should review the staff complement of all units of the central office to ensure that there is no duplication of responsibility with the Regional offices and that where duplication exists reduction of complement be made at the central office rather than at the Regional level.

(ii) Reporting Relationships

The Directors of Education of the Regional Offices report to the Coordinator of Regional Services, who is responsible to the Assistant Deputy Minister in the Education Administration Division. Each of the Superintendent of Curriculum Services, the Superintendent of Supervisory Services, and the Superintendent of Business and Finance relates to his respective branch director in the central office. In turn, it is the expectation that personnel in the Regional Offices will relate to officials of the local school boards. Theoretically, from an organizational standpoint, it should be possible to achieve effective relationships through the co-operation of the various groups involved. In practice, there is a tendency for the central office of the Ministry to relate directly to school boards in matters of immediate concern to it and to by-pass the Regional Office in the process. Local boards in similar circumstances have a tendency to communicate directly with the central office of the Ministry. Each time this happens, or is permitted to happen, it contributes to the development in the minds of representatives of local boards of the impression that the Regional Office does not matter and that for local boards it is more productive and effective to deal with the central office of the Ministry. Undoubtedly there are some occasions when, in the interests of time, direct

communication between the central office of the Ministry and representatives of local school boards is necessary but these should not be used as a reason for following this route on other occasions. Otherwise, in addition to undermining the position of the Regional Office, the central office becomes involved in the administration of matters that rightfully should be with the Regional Office. When this is repeated for nine Regional Offices, it is understandable that central office staff do not have time to perform the functions which only they can handle. At the same time, the quality of the decisions made at the central level without the advantage of the knowledge of the situation possessed by the Regional Office is often likely to be inferior to a decision made in full knowledge of the facts and local circumstances.

(iii) Morale of Staff

When the reorganization of the Ministry of Education was announced in May, 1972, it was stated that proposals for changes in the Regional Offices were not yet ready and that Phase 2 of the study of the reorganization would be pursued immediately. Almost a year later, in February, 1973, the Report embodying the results of the study of the Regional Offices was received. In November, 1973, the Ministry's position on the Regional Offices was released. In the latter document it was announced that, because the position of co-ordinator was new, an extra-Ministry competition for the new co-ordinators would be held in most regions. As a result of protracted discussions and postponed decisions, uncertainties and concerns about the future of the Regional Offices and about their own professional futures plagued staff members. Public statements by the Minister, if reported correctly, have occasionally done nothing to bolster the Regional Offices in the esteem of the public or to provide assurance to staff that they are engaged in worthwhile professional activities as the following quotation illustrates:

"Mr. Wells admitted at the private session that the system of nine regional offices of his ministry was not working as well as he had hoped. The Education Minister said that he even had ignored a policy of trying to decentralize by dealing directly with local school boards, often over the heads of his regional officials."⁴⁷

⁴⁷ Globe and Mail, June 13, 1975.

It would seem desirable to discuss any inadequacies of the Regional Offices in terms of expectations with the officials concerned and to implement policies and procedures to overcome the deficiencies rather than to denigrate their efforts in public.

Another factor that affects the Regional Offices adversely is the practice of appointing to the position of Regional Director, when a vacancy occurs, of an Acting Regional Director. This adds to the uncertainty about the future of the Regional Offices, it weakens the working relationship of the Acting Director with local school boards, and it militates against the effective operation of the staff in the Regional Offices because of its impact on morale.

Either there should be a commitment to the stated policy of decentralization reflected on an operational level or there should be a reorganization to give effect to centralized decision-making. Espousal of the former should not be used to mask implementation of the latter. Nor should a continuing succession of task forces and study groups be used to erode confidence in the principle of decentralization and, in the process, to legitimize a preconceived preference for a more centralized organization. In any case, responsibility for low morale of staff and ineffectiveness of the Regional Offices to the extent that it exists must lie elsewhere than with the staff of the Regional Offices.

Administrative and Financial Services Division

The third major area in the organization of the Ministry of Education is the Administrative and Financial Services Division. This Division is responsible for the provision of services to the other divisions, branches, and sections of the Ministry of Education and, in the performance of its duties, for liaison with branches of other ministries and agencies.⁴⁸ There are, however, certain anomalies whereby some services are provided to outside bodies, such as school boards. The following branches are

⁴⁸The Role and Structure of the Ministry of Education, Ontario: An Organization Manual, September, 1972, (Mimeographed), The Ministry of Education, Ontario, Toronto, 1972, pp. 35-50.

included in this Division: Budget Services; Education Data Processing; Information Systems and Records; Financial Management; Legislation; Management Services; and Personnel.

(a) Budget Services Branch

The functions of the Budget Services Branch include provisions to ensure that the Ministry of Education complies with the special directions and established procedures of the Management Board of Cabinet, the Policy and Priorities Board of Cabinet, and the Cabinet Secretariat. This responsibility is carried out through the supervision of such aspects of ministerial and general governmental administration as the annual estimates of expenditures and revenues, supplementary estimates, special warrants, Management Board orders, and authorizations for commitment of funds. The Branch is involved in the decision-making process in matters having financial implications such as legislation and regulations, agreements with other governments, per diem rates to members of boards and commissions, contract rates, changes in complement, new services, extension or reduction of services, and other significant changes in government policy.⁴⁹

It should be recalled that we have already indicated that several staff members in the Planning Section of the Planning and Research Branch of the Education Development Division are engaged for a good part of their time in the processing of the Multi-Year Plan. It is our view that these activities belong more properly in the Budget Services Branch.

(b) Financial Management Branch

The Financial Management Branch is responsible for the provision of "financial management services in the field of planning, organization and direction of the integrated functions of the Ministry's administration; to evaluate existing systems and procedures; to control and process expenditures and revenues; to provide an internal audit service to management; to coordinate activities in order to ensure

⁴⁹The Role and Structure of the Ministry of Education, Ontario, op. cit., p. 36.

compliance with Government regulations."⁵⁰ Units within the Branch are designated as Financial Consulting Services, Internal Audit, Management Accounting Services, and Processing.

In the official descriptions of the Budget Services Branch and of the Financial Management Branch,⁵¹ both included in the Administrative and Financial Services Division, there is a great deal of repetition of functions to be performed by the two Branches. It is apparent that budget services is a part of financial management. Consequently, it is our view that the Budget Services Branch should be incorporated in the Financial Management Branch, probably as the Budget Services Section. A reallocation of the functions and duties of the various sections should then be made to eliminate duplication of administrative procedures and practices.

(c) Education Data Processing Branch

The former Department of Education established a data processing capability as long ago as the mid-1960s. After some initial difficulties of an organizational and administrative nature, the Data Processing Branch was able to offer a useful service to the then Department of Education. At one time it was proposed that the Ministry of Education should set up a province-wide data processing organization enabling it to communicate with almost every educational institution in the province. Because of reservations about the necessity, desirability, priority, and cost of establishing and operating such an enterprise and because of serious doubt about whether this was an area in which the then Department of Education should be directly involved, the idea was dropped.

In the reorganization of 1972, the main function of the Data Processing Branch was stated to be "to encourage the development of computer services and data processing resources in the Ontario educational

⁵⁰The Role and Structure of the Ministry of Education, Ontario, op. cit., pp. 41-42.

⁵¹Ibid, p. 36 and pp. 41-42.

community."⁵² Among the services to be provided were:

(i) Computer systems to assist the management functions within the Ministry of Education:

(ii) Development and operation of computer systems on behalf of the Ministry of Colleges and Universities, assistance in the processing of Ontario Student Awards, plant administration in the Colleges of Applied Arts and Technology, analysis of university physical facilities and other miscellaneous projects, for which the Branch receives reimbursement for the services provided;

(iii) Development of computer systems to assist the management functions of school boards, schools and other educational agencies in the areas of student scheduling (timetabling), student administration, student guidance information, diagnostic test scoring, questionnaire analysis, payroll, personnel, film library control, CAAT student administration, and college bibliocentre systems;

(iv) Assistance to the Ministry of Education, school boards and other educational agencies in the development of resource personnel with relevant data processing knowledge;

(v) Provision of consultants knowledgeable in computer technology offered on request to many agencies in the Ontario educational community on a cost-recovery basis and in the teleprocessing field the provision of programs which enable boards and other agencies to share Ministry equipment and to communicate with each other, also on a cost-recovery arrangement.⁵³

It was understandable that in 1972 the Ministry of Education should act as a resource for school boards and other educational agencies in a number of the areas referred to above. Subsequently, the government

⁵²The Role and Structure of the Ministry of Education, Ontario, op. cit., p. 37.

⁵³Ibid, p. 37.

moved to centralize much of the computer hardware and a number of associated services in the Computer Services Division of the Ministry of Government Services. The Ministry of Education continued to have its Data Processing Branch.

For the fiscal year 1976-77, the Computer Services Division of the Ministry of Government Services contemplates an expenditure of \$15,369,600, all but \$100 of which will be recoverable from other Ministries.⁵⁴ The Education Data Processing Branch of the Ministry of Education estimates that it will spend \$4,762,300, with recoveries from other agencies of \$1,565,300, leaving a net cost of \$3,197,000.

In the fiscal year 1974-75, it was estimated that expenditures would be \$1,973,400. The actual expenditure was \$2,057,121. In 1975-76, the estimated expenditure was \$4,513,100. These figures compare with the \$3,197,000 for 1976-77.

For the future, there is no doubt that the Ministry of Education must be able to have data processed for its own purposes and for the information of the public. That capability now exists in government although there may well be questions about the ability of the centralized computer services in the Ministry of Government Services to respond promptly enough and adequately enough to meet the requirements of the individual Ministry. That problem exists in almost every large central government agency where the agency does not understand or does not attach sufficient importance to the requirements of a particular Ministry or where it is forced to establish priorities that are unacceptable to a particular Ministry.

But circumstances have changed considerably since 1972, in so far as the necessity for government involvement in some other areas is concerned. For example, given the need for the province to curtail its expenditures wherever possible, it is questionable whether the province should provide data processing services to school boards for a variety of educational purposes. These services are available from a

⁵⁴ Expenditure Estimates 1976-77, Volume 1, General Government, Province of Ontario, 1976, p. G65.

number of institutions or companies on a highly competitive basis. To the argument that government can provide the same services at a lesser cost, it should be definitely determined that for comparison purposes all the costs of the government-sponsored service - evident and hidden - are included in its calculations. Governments have usually not been able to perform more efficiently than the private sector in areas of expertise on which the private sector depends for its continued existence.

In the area of the development of resource personnel with relevant data processing knowledge, there are now a number of educational institutions that provide training programs. No longer is it necessary for the Ministry of Education to be directly involved in this activity.

The basic question to be answered about the provision of services, such as data processing, for school boards is whether the Ministry of Education should be involved in an activity that can be provided by others without direct government sponsorship. It is our view that the Ministry of Education should not allow itself to be distracted from its main purpose by the necessity to administer programs that are only peripherally related to the educational program. It is all too easy to be involved in a multiplicity of activities, to give the appearance of being busily engaged in meaningful programs, while at the same time not giving adequate attention to the real reason for being - in this case providing leadership in the educational program itself.

It is our view that the Ministry of Education should continue to have a capability in the data processing to meet its own internal needs but that it should divest itself of the role of a service agency to other bodies, agencies, or boards. There should be reassessment of the number and qualifications of the personnel required to provide the services essential to the Ministry with a view to effecting economies in future years in the net expenditure of \$3,197,000 shown in the Estimates for the fiscal year 1976-77.

(d) Information Systems and Records Branch

When the Department of Education was renamed the Ministry of Education, as part of the reorganization of 1972, an Education Records Branch was established. The new Branch took over most of the work formerly performed in the Registrar's Branch. The functions of the new organization included assumption of responsibility for maintenance of records of the professional status of all teachers in the publicly-supported school system; issuance of teachers' certificates; maintenance of student educational records and forwarding of student graduation diplomas to principals; and registration of private schools.⁵⁵

In 1972, there was also established a Management Information Systems Section in the Data Processing Branch. In 1975, the Education Records Branch and the Management Information Systems Section were amalgamated and given the name Information Systems and Records Branch. The objective of the reorganization was to "allow central co-ordination for the gathering and usage of education information and records."⁵⁶

The work of the Information Systems and Records Branch is an essential service in the Ministry. The reason for inclusion of the words "Information Systems and" in place of "Education" in the name of the Branch is obscure. The "major objective of the reorganized Branch will be to establish with school boards such procedures that will minimize the frequency of data collection and reduce the time required for the task by all concerned."⁵⁷ Inclusion of the words "Information Systems" in the title merely serves to confuse the public about the purposes of the Branch.

⁵⁵ The Role and Structure of the Ministry of Education, Ontario, op. cit., pp. 37-38.

⁵⁶ Ontario Education Dimensions, Vol. 9, No. 8, Ministry of Education, Toronto, September, 1975, p. 4.

⁵⁷ Ibid, p. 4.

One of the activities of the Branch is the processing of applications for Ontario Scholarships. In each of the fiscal years 1975-76 and 1976-77, the sum of \$1,023,000 was allocated for payment of \$100 to each Ontario Scholar. At this rate provision was made for 10,230 awards or approximately 20 per cent of the enrolment in the last year of the secondary school program. In addition to the financial award, each successful applicant receives a statement that he is an Ontario Scholar.

When the original award in the Ontario Scholarship program was provided for those graduating from Grade 13 with the necessary academic achievement, the financial resources available for students who wished to pursue post-secondary education were very limited or non-existent. In the interval since then an elaborate student support program has been developed in Ontario. The amount designated for specific programs in the fiscal year 1976-77 is \$66,448,500. In addition, there are many other awards provided by post-secondary institutions, organizations, and individuals.

In 1972, the Ministry of Education announced that the financial award accompanying the certificate as an Ontario Scholar would be discontinued. In February, 1973, the Ministry reinstituted the monetary award of \$100. At that time it was indicated that "the full significance of the financial part of the Ontario Scholarship awards had been underestimated, both as a recognition of achievement and excellence, and as an incentive to our young people."⁵⁸

One particular activity of the Branch is no longer justified. The arrangement whereby the Ministry of Education provides proctor service for examinations set by institutions from outside Ontario should be discontinued. Not only does the Ministry of Education not recover the costs involved in the actual proctor service but there are administrative details that occupy the time of staff members. There are other arrangements that institutions from outside Ontario can make on

⁵⁸News Release, Ministry of Education, Ontario, No. 73-02.

their own initiative without involvement of the Ministry of Education. While the financial saving may not be great, a decision to withdraw from this activity would be consistent with the idea that the Ministry should not be involved in matters that should or can be performed by other agencies.

(e) Management Services Branch

The Management Services Branch has responsibility for providing a wide range of services to the Ministry. The Branch is organized into four units - Operational Services Section, Purchasing Section, Systems Section, and a Stores and Distribution Centre. The various responsibilities of the Branch are distributed logically among the four units and provide an effective organization for the delivery of the services to the clients. The costs for the fiscal year 1976-77 total an estimated \$1,459,000, an increase of \$50,500, or 3.6 per cent, over the estimated amount of \$1,408,500 in the fiscal year 1975-76.

(f) Personnel Branch

The Personnel Branch has responsibility for recruitment of staff, staff development, employee relations, salary administration, organization and classification, and personnel records. The expenditure for the operation of the Branch in the fiscal year 1976-77 is estimated at \$376,600, an increase of \$15,100 or 4.1 per cent, over the amount of \$361,500 in 1975-76.

(g) Legislation Branch

The Legislation Branch has responsibility for the preparation of legislation and regulations for the Ministry, for liaison with other agencies in matters having to do with legislation relating to education, and for the provision of legal services on matters referred to it.

The Legislation Branch was created as a separate entity in the reorganization in 1972. Until that time the provision of legal advice was part of the responsibility of the supervision area. Additional assis-

tance was required during the period when the five former Acts governing education were being consolidated into The Education Act, 1974. However, the justification for the establishment of a separate Branch to provide the required services is obscure.

The amount included in the Estimates for 1976-77 for the Branch is \$301,300, an increase of \$45,400, or 17 per cent, over the amount of \$225,900 in the fiscal year 1975-76. While the necessity for legal services has undoubtedly increased over the years, now that the major task of developing The Education Act, 1974, has been completed, it would seem that a reduction in the work of the Branch should be anticipated and that a corresponding financial saving should be realized. Many of the activities of the Branch relate to the administrative functioning of the educational system and to the activities of the Supervisory Services Branch. If responsibility for legal services were assigned to that Branch, it is our view that they could be performed by an Education Officer and a Solicitor. The reduction in complement would result in a considerable saving.

General Comments

(a) Reorganization of Ministry of Education

A review of changes in the Ministry of Education shows that, beginning with the reorganization of 1965, the Ministry has been undergoing almost continuous alterations in the administrative structure, particularly since 1972. The realignment of 1965 was in response to a need for a revised delivery system for educational services to replace the model that had been in existence for a considerable period of time. Society had changed greatly in the 1950s and early 1960s and the magnitude of the educational operation had been increased beyond any previous expectation. New demands on the educational system required new programs to deal with them. As a result, a number of substantive changes were made. For example, acceptance of the principle of decentralization of administration resulted in creation of the Area Offices. But other important developments were also taking place such as introduction of educational television, creation of the Colleges of Applied Arts and Technology, provision for graduate education and research,

expansion of composite secondary schools, and a host of other innovative programs. Consequently, it was necessary and inevitable that the administrative structure would have to be updated to meet the requirements of the new education.

It was also probably true that some adjustments would be necessary in the 1970s to recognize the end of the expansion period in education and the beginning of an era of consolidation and emphasis of qualitative improvement. The reorganization of 1972 introduced a number of changes. The Instruction Division was renamed the Education Development Division. The Curriculum Branch became the Curriculum Development Branch and a separate Curriculum Services Branch was established. The Teacher Education Branch, which had earlier incorporated the Professional Development Branch as a section, became the Teacher Education and Certification Branch, and the Professional Development Section disappeared as a separate entity. The Correspondence Courses Branch was incorporated in the Provincial Schools Branch. The Special Education Branch was discontinued as a separate entity and the schools for the Blind and Deaf Branch became the Provincial Schools Branch. Responsibility for some other activities, as for example, the Colleges of Applied Arts and Technology and the Provincial Library Service were transferred to the Ministry of Colleges and Universities. There was also some realignment of functions under new titles as, for example, transfer of the responsibility for legislation from the Supervision Branch to a new Legislation Branch in the Administration and Financial Services Division.

At the time that these changes were made the "overall goal of the Ministry of Education was stated to be to ensure that educational opportunities of recognized quality are made available on an equal basis to all children up to a minimum age of 16 and to all citizens who have a desire to learn and develop through secondary educational experience."

"With a view to providing this quality service to the people of Ontario, a new organization of the Ministry of Education came into effect on April 17, 1972. The main purpose of the reorganization was to establish a basis for the efficient organization of its resources which will

be flexible and responsive to the needs of education in the Province in the months and years ahead."⁵⁹

On June 28, 1976, new organizational changes within the Ministry of Education were announced⁶⁰ to be effective July 1, 1976. These included the following: the Education Development Division is designated the Program Division; the Curriculum Development Branch is to be renamed the Curriculum Branch and will incorporate the Curriculum Services Branch which will be discontinued; the Teacher Education and Certification Branch became the Teacher Education Branch; a new Professional Development Branch is to be established; responsibility for correspondence courses will be removed from the Special Education Branch and established as the Correspondence Education Branch; responsibility for legislation is included in the Supervisory Services Branch which is renamed the Supervision and Legislation Branch. A comparison of the results of this latest reorganization with the designation of branches prior to or in 1971, before the reorganization of 1972, shows that there has been a return to the former names for several units as illustrated by the Curriculum Branch, Teacher Education Branch, Professional Development Branch, Correspondence Education, and Supervision (and Legislation). These are hardly substantive changes. An exception might be discontinuance of Curriculum Services Branch as a separate entity, with which we concur, although it is our view that the number of staff in the combined unit might be reduced considerably.

One reason given for this latest reorganization is that the "changes are basically a realignment of some functions, and are designed to reflect new policy directions which are emerging in relation to internal constraints and to liaison with school boards."⁶¹ It is further stated that "the changes described here will have some influence on Regional Office operation, and consideration of any necessary adjust-

⁵⁹Reorganization of the Ministry of Education, Memorandum 1971-72: 44, dated May 19, 1972.

⁶⁰Organizational Changes Within the Ministry of Education, Bulletin 1976 D.M. - G. No. 21, Ministry of Education, Ontario, Toronto, June 28, 1976.

⁶¹Ibid, p. 1.

ments may constitute the final stage in the realignment of the Ministry. To that end Regional Directors are currently considering some possibilities, and they will shortly communicate these to the Assistant Deputy Minister, Education Administration Division."⁶² The concluding paragraph of the announcement reads as follows:

"Those staff members who will be involved in some changes will have an opportunity to discuss them with appropriate officials within the Ministry in order to ensure that staff placement is made in the best interests of the career aspirations of the individual and the goals of the Ministry of Education. It is anticipated that these organizational realignments can be effected with the minimum of personal and professional disruption. Your cooperation and understanding as we attempt to increase the effectiveness and efficiency of the Ministry of Education is greatly appreciated."⁶³

This latest announcement of yet another reorganization of the Ministry will inevitably contribute to the uncertainty of staff, particularly of those in the Regional Offices. For five years the continuing emphasis on realignment of duties, name changes, and other non-substantive adjustments in the organization have served to divert the attention of many staff from the performance of their duties to concerns about the continuance of their positions, the future of their homes and families, and the possibilities for attainment of their professional goals. It is recognized that the goals of the organization are of paramount importance but these can only be achieved in education through the performance of staff who endeavour to implement those goals. When much of the activity can be described as "organizational tinkering" and a return to former abandoned patterns, it raises the question of whether it is worth the effort in terms of any positive effect it may have on the educational program or on the personnel responsible for the implementation of the program.

(b) Utilization of Staff

In the multiplicity of changes in title and transfers of duties brought about by the reorganizations of the Ministry and the Regional Offices, it is inevitable that staff members may be required to undertake some

⁶² Ibid, p. 3.

⁶³ Ibid, p. 3.

duties which they had not previously performed. For the most part, professional personnel can make these adjustments successfully if there is some relationship between their new assignments, their capabilities, and their previous experience. A few can even do so regardless of background. Certainly there are advantages both to the individual and to the organization when opportunity is given for the employee to expand his horizons and breadth of experience by challenging new assignments. This is particularly true for those who possess the potential to assume more senior responsibilities in the organization in the future.

At the same time, there are disadvantages to both the individual and the organization when indiscriminate appointments are made without regard for professional preparation, career interests, and background of experience that is so important in the establishment of credibility with one's colleagues. Moving people with a particular expertise to an unrelated position requiring competence that they do not have or that could be done by a less highly qualified person can also be costly to the organization, not only in terms of performance but also from a financial standpoint. There are numerous examples of these types of appointments in the Ministry.

It is our view that the Ministry should make appointments on the basis of the most competent persons available having regard for professional preparation, demonstrated performance, and personal interests and abilities, in relation to the demands of the position. The result should be a more satisfied staff, improved performance in the position, and economy in salary expenditures.

(c) Committees in Ministry

There are a multiplicity of committees on which staff of the Ministry of Education are represented. These are classified as Intra-Ministry, Inter-Ministry, and Extra-Ministry.^{64, 65} In 1972, there were some 90

⁶⁴The Role and Structure of the Ministry of Education, Ontario, op. cit., pp. 51-71.

⁶⁵Committees - A Working Guide, Memorandum from the Assistant Deputy Minister, Ministry of Education, Ontario, Toronto, September 21, 1973.

committees on which the Ministry had appointees. Some senior staff estimated that they were required to devote from 25 per cent to as high as 60 per cent of their time serving on these committees. The result was that they had to spend an inordinate amount of their time outside their regular hours on office work in order to keep up with the demands of their positions.

There are good reasons for the appointment of committees to consider specific problems or to study on a continuing basis some aspects of the Ministry's or the government's operations. There are also committees that serve as a means of communication among bodies that have an area or areas of common interest. There is a tendency, however, to establish committees without adequate safeguards against their perpetuation beyond the time when the purposes for which they were established have been served. But some committees can also be wasteful of time and effort of staff who might be devoting their energies to more useful pursuits. In the Ministry of Education too many officials are devoting too much time to committees. It is our view that each committee should have a terminal date set for its existence and that prior to that date justification for any renewal of its mandate should be required. Only for compelling reasons, including the consideration and rejection of possible alternatives for accomplishing the purposes of the committee, should it be allowed to continue for any stated additional period.

Conclusion

We have considered in some depth the role and function of the Ministry of Education. We can find no better statement that conveys our views on this subject than the policy statement by the then Minister of Education in the Legislature on June 4, 1968. Fleming quotes the Minister in these words:

"The function of departmental officials is to develop and continuously review a comprehensive philosophy of public education. This educational planning - which must cover an extremely broad spectrum, taking into account the social and economic needs of all citizens - is then expressed as policy in two principal ways: through the medium of the educational laws, which form the framework for publicly supported education, and through the distribution of funds, which are not unlimited and therefore must be invested with some wisdom. Being centrally

located, the department is also specially qualified to be a resource centre for new information and a clearing house for worthwhile ideas emanating from within and outside the province.

These are ... the three basic or principal responsibilities of the department, and all other involvements, it seems to me, can only have the effect of diluting the considerable effort required to do those jobs well. With the decentralization of many of the traditional departmental functions to local authorities which are situated more closely to the public they serve, departmental officials will be better able to concentrate on those responsibilities which they are best equipped to perform.

The main condition needed to bring about this ideal situation is that local educational authorities should be large enough to be able to provide a full range of programmes plus the highly specialized staff of psychologists, reading consultants, speech therapists, and others that are required if all children are to be given the opportunity to achieve their maximum potential.

Realization of such an aim will call for co-operation, highmindedness and quite frankly, some sacrifice. This centralization at the local level is in no way inconsistent with the philosophy of decentralization at the provincial level. We should strive for an optimum local organization which is close enough to the local scene to be fully conversant with its problems, yet large enough and well enough staffed to receive delegation of responsibility from the department. This delegation of duties will provide the local staff and specialists with the flexibility and freedom from artificial constraints which will enable them to operate at maximum effectiveness.

The point I wish to stress here is that a distinction must be drawn between "operating" functions and "policy-making" functions. I am suggesting that, in a highly developed and mature educational system such as we have in this province, "operating" functions are most effectively and appropriately the responsibility of local agencies such as boards of education and boards of governors. The central Department of Education, on the other hand, must be responsible for overall planning...

I would suggest that we can best focus the role of a central Department of Education by investigating some of its broad strategic objectives and resulting responsibilities. These might be stated as follows, and not necessarily in order of priority.

1. The department is responsible for ensuring that all citizens have suitable educational opportunities. This involves the setting of objectives, the provision of leadership and the establishment and involvement of appropriate authorities to implement the necessary programmes.

Leadership cannot take the form of dictation from a superior authority to other levels. To be effective, it must be based on mutual respect and recognition of the special contributions which can be made by all parties to the total educational enterprise. For example, classroom teachers and local authorities are particularly qualified to take part

in the development and implementation of new approaches to meet specific circumstances with which they are familiar. The department, on the other hand, because of its central location, is uniquely equipped to disseminate locally developed techniques to other parts of the province.

2. The department should delegate the operation of institutions to other bodies, for example, local education authorities which, through legislation, are given sufficiently wide powers to ensure that all educational needs of society are met.

From this premise, it follows that the department must encourage the establishment of authorities suitable for the task; such authorities as large local education jurisdictions, colleges and institutions, to which responsibility can be delegated. Such agencies should be given encouragement to innovate, with as much freedom from regulation as is consistent with the central authority's responsibility.

3. The department must provide financial resources to local education authorities and establish priorities so that resources which are scarce may be allocated in the most judicious manner. Here, the primary needs are analysis and long-term planning.

4. The department has a responsibility for research, whether it engages in it directly or encourages local education authorities and other agencies to search for fresh approaches and better educational methods.

5. The department must provide assistance to local education agencies in the form of consultative services, proposals and new ideas for curriculum development, and must assist in providing suitably qualified personnel.

These suggestions concerning the appropriate role of a Department of Education are based on a number of assumptions. The first is that the true strength of a democracy lies in the opportunities which it provides for individual growth and development, and that this can best be achieved through the scale of diversity and flexibility which is only possible in a decentralized system.

Another assumption is that, in educational matters, locally elected representatives working with professional teachers can be counted on not only to maintain existing standards but to achieve new heights of excellence, which will ultimately be of benefit to all."⁶⁶

Fleming illustrated the favourable response of the press to the Minister's statement by referring to an editorial entitled "Change in Policy", which appeared in the issue of the Sarnia Observer for June 10, 1968. It began as follows:

⁶⁶Fleming, W.G., "The Administrative Structure", Ontario's Educative Society /II, University of Toronto Press, Toronto, 1971, pp. 23-24.

"Ontario Education Minister William Davis, appears to be a practical man. With the new county and district school boards not far in the offing, he is going to decentralize his department and leave only the brass in Toronto to determine policies.

That is probably the most thought-provoking word to come out of Queen's Park for a long time. Imagine cutting down on the horde of people swarming around the education department and putting them out in selected spots throughout the province, where they could be more accessible!"⁶⁷

Reaffirmation of and commitment to the policy enunciated in the above references would do much to reassure school boards, teachers, supervisors, administrators, educational organizations, and the general public that education in Ontario is being conducted in a manner that recognizes the capabilities of people at the local level, that is responsive to the needs of local communities, that provides for innovation, experimentation, and creativity in the schools, and that places paramount importance on the interests and welfare of every pupil enrolled in the schools of the province.

To paraphrase part of a statement⁶⁸ made about a different but similar relationship between two levels of organization, if the policy described above is supplemented by a decision of the Ministry of Education to choose to do itself only those things in which it can excel and to excel in those things which it has chosen, we will be as close to an ideal division of authority and responsibility in education as we could reasonably be expected to achieve.

⁶⁷ Ibid, p. 25.

⁶⁸ Watts, R.L., "Provincial Co-ordination and University Autonomy", The Principal's Report 1974-75, Queen's University at Kingston, Kingston, 1975, p. 6.

CHAPTER 6

SCHOOL BOARDS

Under the provisions of The Education Act, 1974, the elected trustees of all school boards have certain duties and powers¹ which they must assume and others² which they may perform. The great majority of these functions have their origin in the early provisions for education in the province and in the local autonomous control of schools in those days. Much of the success of Ontario's school system can be attributed to the involvement of citizens at the local level in the determination of school board policies.

In societies that embrace the democratic form of government, it is important that the people show an interest and concern about the determination of matters that affect their lives and that the decision-making take place as nearly as possible to the people affected. This principle has served Ontario well and has been the basis for the development of governance for education in other provinces of Canada. Its applicability is even more relevant in our modern industrial society than it was to the pioneer period in which it emerged.

There are, however, a number of threats and challenges to the authority, responsibility and accountability of school boards. Reference has already been made to the necessity for school boards to work in co-operation with the Ministry of Education. But school boards should also insist on the recognition and maintenance of their vital role in the pursuit of excellence in education and should resist with resolution any attempts to erode the powers and duties now assigned to them. In this endeavour they should solicit the support of their citizens in community organizations and other groups interested in education.

¹The Education Act, 1974, Section 146.

²Ibid, Section 147, subsection (1).

Main Function of School Boards

School boards should undertake a number of initiatives to ensure improvement in the quality of education in their jurisdictions. For example, each school board has a special responsibility to determine, in consultation with its communities, the goals of the educational system, within the broad purposes set out by the Ministry of Education. All too often in the past, trustees have not concerned themselves with the establishment of those goals or with the enunciation of an overall philosophy to give direction to the school system.

There are several reasons why school trustees do not apply themselves to matters which should be their major concern. Some trustees are more knowledgeable about day to day activities of the school system and tend to interest themselves in administrative trivia. For example, if the trustee is a businessman, he may wish to apply his knowledge and expertise gained in his employment to his school board activities. This can be a valuable contribution provided that it is recognized that the school board may have in its employ a person especially qualified to perform the administrative functions related to the business area of the board's operations. If, however, the school trustee spends most of his time at committee and board meetings in discussion of the areas of his own competence to the exclusion of a consideration of the goals of the school system, its programs, priorities, evaluation reports and overall planning, then the school system is likely to be less well served than it could be.

Other trustees may shy away from consideration of areas of planning, curriculum, philosophical direction because they feel inadequate or incompetent. Instead, they should attempt to overcome their reservations about involvement in these areas through education. It is quite possible, indeed imperative, that the policy decision-makers know about the purposes of the enterprise in which they are engaged and the extent to which the wishes of the community are being realized. Only in that way can they fulfill their policy-making role.

Occasionally, the chief executive officer of the school board or the board's administrative team assume the policy-making function of the board.

If trustees occupy their time with administrative matters, the officials fill the vacuum created by the absence of direction from the elected representatives. In some other instances, officials may ensure that trustees are kept preoccupied with inconsequential matters so that substantive decisions remain or become their prerogatives. To ensure that the elected representatives fulfill their proper role, trustees should insist that they, in consultation with staff, determine the agenda for all meetings of the board and its committees. The board should insist that reports submitted to it with recommendations for action set out the background of the problem to be resolved, the "pros" and "cons" of possible alternative courses of action, and the rationale for the choice of the alternative proposed. An important element in this process is the provision of information and data on which a decision can be based. Trustees should insist that all relevant background material be provided. The absence of or the withholding of all available information should never be countenanced.

Relationship of School Board to the Community

As an important element in the policy decision-making process, school trustees should consult with their constituents and be sensitive to their desires and wishes within the overall context in which the school system must function. No longer is it sufficient for the school board to disseminate a "pie" graph showing the percentages of the budget devoted to such items as salaries, plant operation and maintenance, administration, and the other items of the code of accounts. Valuable as this type of information may be, it is almost wholly inadequate and uninformative. Much more sophisticated methods of reporting are required but, in addition, specific methods to establish a two-way flow of information are essential.

There are numerous groups within the community with which liaison should be established and cultivated. One of the most obvious is, of course, the Home and School Association. But others include ratepayer organizations, churches, youth groups, ethnic organizations, and a multiplicity of other special interest representative bodies. The initiatives by which these elements in the society make their views known should not always rest with them. School boards should actively seek their participation and to that end should help in the establishment of mechanisms and procedures by which

their voices will be heard. The nature of society in the 1970s and beyond demands that the school system be considerate of and responsive to a wide spectrum of people with a tremendous variety of social and cultural backgrounds and perspectives.

Key Role of the School and Principal

The school is the basic unit for the delivery of educational services, for the development of educational programs, for curriculum development, and for the exercise of educational leadership. The principal should be the educational leader in the community served by his school. Leadership in this context means, among other important factors, that the principal assumes responsibility for the professional growth and development of the staff with which he works, that he creates the climate in which staff members feel secure enough to introduce innovations, to experiment, to be creative, that he utilizes the leadership resources within his staff and the community, that he is supportive of efforts to improve the quality of education, and that the school accepts its role of accountability to the community for the instructional program.

In far too many jurisdictions the principal does not fulfill his role of educational leadership. There are several reasons for this deficiency. Some school boards are unwilling or unable to recognize the pivotal role of the principal as the educational leader in his community. Consequently, the necessary responsibility and authority to fulfill the leadership role are withheld. The duties assigned to the principal are of a mundane nature accompanied by restrictive policies and procedures that deny the exercise of the initiative necessary to the performance of the leadership function.

In other school systems, the central administrative officials consider themselves to be the educational leaders. They are unwilling to see the delegation of a large part of the responsibility for leadership as essential to educational progress in a specific community. This reluctance to share the leadership role is the source of a number of negative results. It stunts the professional growth of the principal and his staff, it makes the school less responsive to the unique needs of a particular community, it reduces the possibilities for involvement of the community in decisions that affect

its members, it relies to a considerable extent on an authoritative and hierarchical organizational structure for conduct of the educational program, and transfers accountability from the school to the more remote and less easily identifiable central office personnel.

The principal, if he is to be the educational leader in his school community, must have the personal characteristics, the academic and professional competencies, and the experience to fulfill the role. All too often, principals have been reluctant to assume the responsibilities associated with the leadership function. They have been content to carry the title of principal while busying themselves with administrative matters only peripherally related to the instructional or educational function. There are a number of reasons for this interpretation of the principal's role. Among them are lack of a personal philosophy of education to give direction to the work of the position, insecurity in the supervisory role, inability to be creative, lack of understanding of the leadership function, inadequacies in interpersonal relationships, and unwillingness to run the risks associated with community involvement.

The present procedures for certification of principals do not ensure the attainment of the competencies and understandings that are required of the principal as an educational leader. The summer courses offered by the Ministry of Education, as part of the requirements for certification as a principal, while useful, are no substitute for the development of a sound theoretical base in the several areas of expertise required by a principal. The certificate has been awarded to hundreds of applicants in the last few years so that its value as a professional qualification has been greatly debased. It is time that the requirements for certification as a principal be increased to at least possession of the Master's degree in education with distribution of course offerings that will ensure background in the areas of expertise required of a principal. In addition, some provision should be made for prospective principals to serve as interns in school systems where democratic leadership has been established.

The allocation of financial resources represented by the salary now paid to a principal can only be justified if the principal is performing the professional role of leadership described above. If he is operating in this

manner, it will be possible in many school systems to reduce the number of central office supervisory staff. Those that remain at the system's headquarters should see themselves as resource personnel to facilitate the functioning of the principal as an educational leader in his community. The present costly arrangement, whereby substantial salaries are paid to principals to perform their functions in the schools while still higher salaries are paid to supervisory personnel at the central office to ensure that the educational program is implemented by the principal and his staff, is no longer acceptable in a time of scarce financial resources.

Positions of Responsibility

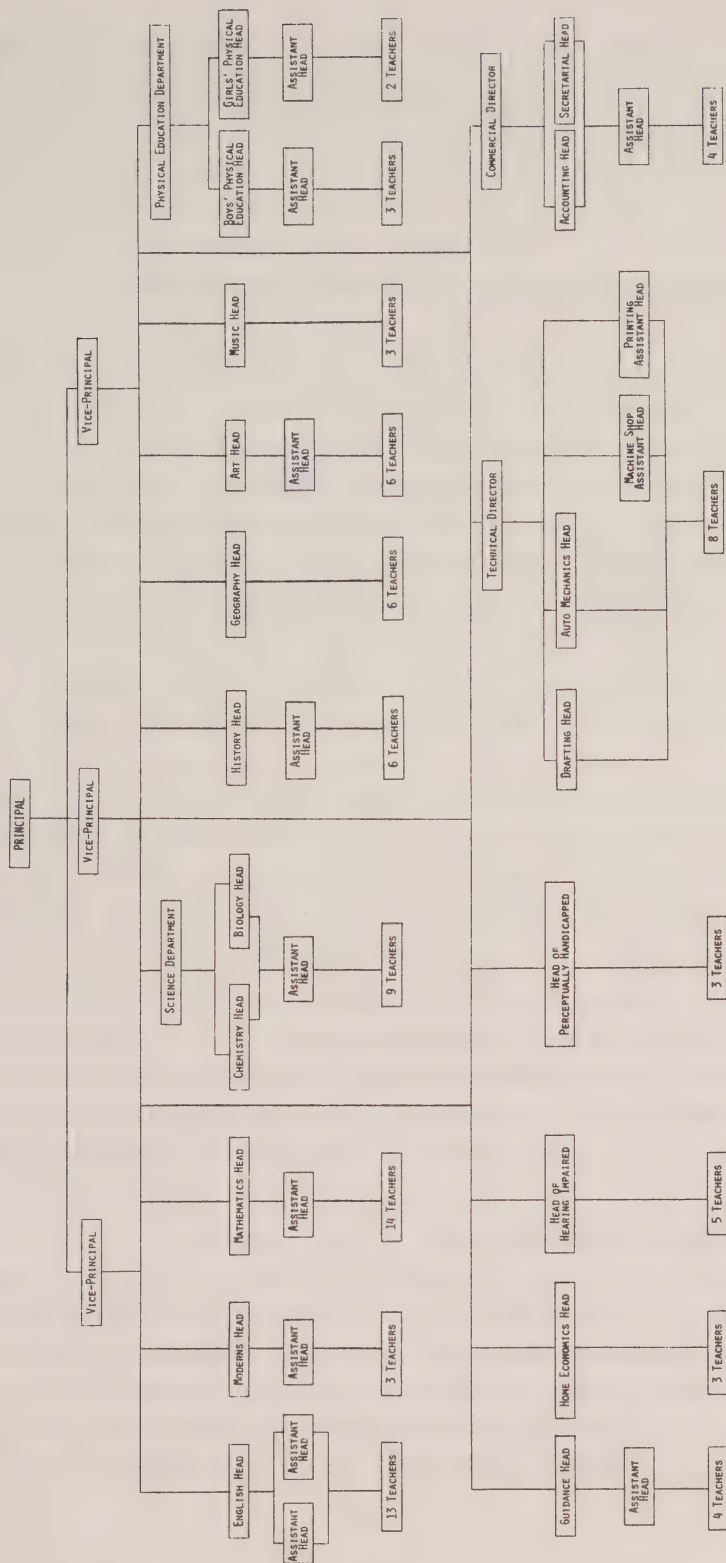
A position of responsibility held by a teacher carries with it a special designation and in nearly all cases additional remuneration. The requirements for appointment of department heads and directors at the secondary school level are contained in Ontario Regulation 191, made under authority of the former Department of Education Act and continued under authority of The Education Act, 1974. In large part, the specific and mandatory nature of the Regulation is outmoded and does not adequately take into account the changes which have taken place in educational programs, professional development of teachers, organizational structures, and administrative units.

Over a considerable period of time, there has been a trend towards increasing the number of positions of responsibility, particularly in the secondary schools. An impetus was given to this trend during the shortage of secondary teachers in the late 1950s and in the 1960s. Some boards, in an endeavour to attract experienced teachers away from other boards, created titles, as for example "Master Teacher", and paid additional salary to staff with this designation. Boards which already had experienced teachers attempted to retain them by establishing new positions of responsibility with comparable financial inducements. For the most part, any additional duties to be performed were non-existent or minimal. In the great majority of cases, there was little or no justification, in terms of added responsibilities, for payment of the additional salary provided. Rather, the extra remuneration was paid to secure or retain well qualified, experienced, and competent classroom teachers.

In recent years, teacher organizations have attempted through the collective bargaining process to consolidate and increase the number of designated positions of responsibility by securing approval of formulae designed to generate the maximum possible number of these positions. They have had a considerable degree of success in this endeavour to the point where, for example, in one large school board jurisdiction about one-third of the total teaching staff hold designated positions of responsibility.

The many titles applied to the "so-called" positions of responsibility are "mind-boggling". They include head, associate head, assistant head, subject head, dean, assistant dean, major headship, minor headship, director, chairman, and many others. The number of staff in any one school who hold these or similar titles is determined largely by the number of single subjects, or groups of subjects, or programs that the school offers. Chart 2 shows an organizational structure for a large secondary school of some 2,000 students. There is a teaching staff of 126, exclusive of the principal and three vice-principals. Those with positions of responsibility are two directors, 19 heads, and 13 assistant heads for a total of 34, or 27 per cent of the total teaching staff. In the English department there is a head, two assistant heads, and 13 other teachers, in the Mathematics department there is a head, one assistant head, and 14 other teachers, and in the Moderns department a head, one assistant head and three teachers. While there are differences among subjects and in experience and qualifications of staff, that may require different organizational provisions, the ratios of positions of responsibility to other teachers is all too often without logical justification. It is completely untenable that the Physical Education department should have two heads, two assistant heads, and five other teachers, a ratio of four positions of responsibility for five other teachers. Similar excesses and inconsistencies exist in other instructional areas, as the Chart demonstrates. It should not be assumed that the example chosen is unique among Ontario secondary schools. After necessary allowance for lower enrolments, the pattern described is quite common and more typical than unusual. Any tendency towards extension of this pattern into junior high schools, or senior public schools, or elementary schools should be resisted, not only for the reasons cited but also because of the negative impact it could have on the quality of the educational program in terms of subject specialization and rigidities.

CHART 2
EXAMPLE OF A SECONDARY SCHOOL ORGANIZATION



There are a number of corrective steps that should be considered. The Regulation relating to Elementary and Secondary Schools - General should be amended to remove the mandatory appointment of department heads so that action in this matter is permissive. Any provision for the number of positions of responsibility should be determined by the school board with the possibility that this matter will be the subject of part of the negotiations between the board and its teacher organizations.

A school with a principal and three vice-principals, such as the one shown in the Chart, should not require anything like 27 per cent of its teachers to be named to positions of responsibility. There is ample justification for a number of subjects to be grouped under headings such as Pure and Applied Science, Communications, Social and Environmental Science, Arts. If division heads are appointed for each of these four areas, it should not then be necessary to appoint a department head, either major or minor, for all the individual subjects within these divisions. Certainly a case can be made for some assistant division heads but these should be fewer in number than the subjects represented within the division.

A job description should be developed for each position of responsibility, provision should be made to monitor the performance of incumbents, and evaluation should be conducted against agreed-on criteria. No longer should positions of responsibility be seen as sinecures, without professional recognition, and without any meaningful supervisory importance or relevance. Indeed, the needs for improved professional productivity, for a more effective school, for a more responsive organizational structure, and for wise use of scarce resources, all demand that waste and duplication be eliminated wherever they exist. Reduction in the number of positions of responsibility is among the most evident places to begin this exercise.

Attendance at Conferences

During the last two decades there has been a substantial increase in the number of educational organizations to which members of the teaching profession, supervisors, and administrative personnel may belong. These include an association for each of almost all subject areas, for each of a number of administrative positions, for each of a number of supervisory

categories and chief executive officers, and for professional organizations. Some of these organizations have local, provincial, and national counterparts, thereby multiplying the occasions when members wish to be absent from their regular duties to participate in the activities of the groups in which they hold memberships.

There is little doubt that some value usually accrues to the individual participant and to the school system as a result of involvement of a staff member in the work of a professional organization. The extent of that value depends to a considerable degree on the relevance of the organization's objectives and programs to the professional responsibilities of the staff member. But there are limitations on the benefits to be derived from participation in some organizations and there are certainly negative results when any staff member is permitted or required to be absent from his regular duties for an extended period of time or on too many occasions.

There are a number of considerations that school boards should take into account in the establishment of policy governing the absence of staff from their regular duties. For example, in so far as teaching staff are concerned, students are the losers when their regular teachers are absent for whatever reasons. The occasional teacher, no matter how competent, is unable to provide continuity in the program because he is largely unaware of the progress made before his involvement, and because he does not know the students and their particular abilities, strengths, and weaknesses. In many cases, the occasional teacher is not taken seriously by the students and in a number of situations is unable to maintain discipline to the point where meaningful learning can take place. When the occasional teacher is inexperienced, the difficulties are likely to be compounded. This is not to say that some occasional teachers do not do good work or that all occasional teachers do not make a sincere effort to make a useful contribution. But the circumstances work against their being able to compensate fully for the absence of the regular teacher. Again, a great many regular teachers recognize the obligation to be with their classes except on the rarest occasion or because of the most unusual circumstances. But there are still too many teachers who are involved in activities which necessitate their absence from their regular duties. It is these cases that require the adoption of a policy that ensures the maximum possible contribution to the learning

environment for students.

There are also financial considerations that need to be taken into account. When permission is granted for a staff member to be absent from duty to attend a conference elsewhere, the first cost is the payment of salary for a replacement. Travel and daily living allowances have escalated greatly in recent years. Expenditures for air travel are still rising because of increased energy costs. Registration fees for most conferences have also been increasing.

In a time of scarce financial resources, school boards should be fully aware of the financial commitment involved in attendance of a staff member at any conference. All the costs should be shown when any recommendation for absence is being considered. At the same time, there should be a well-substantiated justification, in terms of benefit to the school system and the students, for the granting of leave for any staff member. School boards should establish priorities for allocation of resources and should ensure that criteria against which to evaluate the benefits derived from the participation of staff in outside conferences are known and applied.

While the references cited above apply to teaching staff, they are, with some modification in terms of direct classroom effect, equally applicable to other staff personnel in supervisory, administrative, and operational areas.

Sick Leave Credit Gratuity Payments

Most school systems have a policy whereby sick leave credit gratuities are paid to employees on retirement or termination of employment. Under the provisions of Section 155 of The Education Act, 1974, an employee may receive payment for one-half the number of days standing to his credit up to a maximum not exceeding one-half year's earnings at the rate received by him at termination. For many years, a teacher's contract has contained a provision whereby the teacher is entitled to sick leave with pay for a maximum of twenty school days per year. Each school year was considered a separate period for this purpose. The intent was to provide some insurance against loss of salary on account of illness.

Subsequently, teachers considered that any portion of the unused twenty days in any school year should be carried forward to future years to protect them against periods of illness in excess of twenty days in one school year. Still later, teachers who had an accumulated credit of such leave days felt that they should receive some financial payment for these days when they retired or left the employ of the board. School boards ultimately granted both these requests and they were provided for in legislation.

There are several aspects of the accumulated sick leave credit system and the payment of gratuities on retirement or termination that require close examination. First, sick leave credits were established as a form of insurance against loss of salary on account of illness. There is no justification from the standpoint of insurance for the payment of gratuities to those who are fortunate enough to have enjoyed good health. Second, no provision exists for the funding of the liability created by the accumulation of sick leave credits. Consequently, the payment of gratuities must be financed from current revenues of the board. This can amount to a substantial sum in any year with a considerable impact on the annual budget. These, and other considerations, suggest that it is time a new policy was developed to ensure protection against loss of salary through illness without providing a bonus for good health.

A number of organizations, including some in the public service sector, have adopted long-term disability insurance. Through a combination of payment of salary for the short term and insurance payment for long-term disability the employee is protected against loss of salary. When this type of insurance is introduced, a "grandfather" clause is usually applicable in some form for employees who had established credits up to the date of introduction of the new coverage.

Organizational Structures

This Report has included a number of references to the evolution of representative bodies for the governance of education in Ontario and to the development of corresponding administrative practices and procedures for the conduct of the educational enterprise. Some of these changes have been of a minor nature, while others have had a substantial impact. Many of them

took place because of the cataclysmic events and developments in the society in which the school functions and of which it is a part. Whatever the reasons, there can be no denying the magnitude or importance of the adaptations and adjustments that have taken place.

Probably the most significant change in recent years was the establishment of the county and district school boards which began operation on January 1, 1969. Some of them were limited in the kind of organizational structure they could provide because of the nature of the administrative units they inherited. Others were circumscribed by the number, qualifications and competencies of the personnel that were absorbed into the new organizations. A few were from the beginning able to develop their administrative structures to meet the particular needs of their school systems. In every case there was a testing period during which adaptations and adjustments had to be made as experience was gained with the newly-established units.

A number of the new county and district boards have commissioned special studies of their administrative organizations during the eight years they have been in existence. For example, the Waterloo County Board of Education cooperated with The Ontario Institute for Studies in Education in an extensive analysis of its administration.³ The Nipissing District Roman Catholic School Board engaged a management consultant firm to report on its organization and salaries.⁴ Other studies have been conducted or are in progress. While it is important that each board consider its particular needs in the administrative area, it is also desirable that there be some overall study of the effectiveness of the means for the delivery of educational services by school boards. We propose that such a study be undertaken.

The proposed study should be undertaken as a cooperative venture by the boards themselves. They should develop the terms of reference and should

³Greenfield, T.B., et al., Structure, Decision-Making, and Communication in the Waterloo County School System, The Ontario Institute for Studies in Education, Toronto, May, 1974.

⁴Nipissing District Roman Catholic Separate School Board, Part 1: Organization Study and Part 11: Salary Evaluation Study, The Thorne Group Ltd., Toronto, July, 1972.

determine the time frame within which the work would be conducted. They should also decide by whom the study will be conducted and should ensure that only competent researchers are engaged so that the design of the study, the methodology used, the analysis of the data, and the necessary objectivity are beyond question. Because the findings of the proposed study could be of value to the Ministry of Education as well as to school boards, the Ministry should be prepared to fund the study by a substantial grant. The results of the study could be a significant contribution to the attainment of quality education in the province.

CHAPTER 7

METROPOLITAN TORONTO SCHOOL BOARD

Creation of The Municipality of Metropolitan Toronto

Many problems faced the thirteen municipalities in the Metropolitan Toronto area after World War II. Some of them arose from inadequacies in the provision of municipal services such as police protection, water, sewers, roads, and transportation. The resolution of these difficulties was hampered or made impossible by the complete jurisdictional independence of each municipality from its adjacent municipalities. There were also wide disparities in the ability of the municipalities to undertake the financial commitments necessary to provide these essential services. In 1950, the Ontario Municipal Board was requested to approve a number of boundary changes which it was claimed would alleviate some of the problems. The Board rejected these proposals and instead put forward its own recommendations for reform of municipal government in the Metropolitan area. These recommendations were incorporated in a document that became known as the Cumming Report¹ after the Chairman of the Ontario Municipal Board, Mr. Lorne Cumming. The Report was released on January 20, 1953.

The solution proposed in the Report was the creation of a federation of the thirteen municipalities with a two-tier organizational structure. The new joint central authority would have complete responsibility for those functions and services that were essential to the entire area. The thirteen municipal authorities would continue to have jurisdiction over those matters that were of a local nature. It was easy to see the necessity for coordination of certain municipal services. For example, integration of the thirteen police forces was essential because crime and criminals have little or no regard for municipal boundaries. Watermains, sewers, roads, and transportation depend for their effectiveness and efficiency on their continuity, again without regard for municipal governmental structures. Equally obvious was the fact that provision of these services and facilities depends to a considerable extent on the existence of an adequate tax

¹Cumming, L.R. (Chm.), The Ontario Municipal Board, Decisions and Recommendations of the Board, Dated January 20, 1953, In the Matter of Sections 20 and 22 of "The Municipal Act", (R.S.O., 1950, Chapter 243), Queen's Printer, Toronto, 1953.

base to provide and support them. The total assessment of the whole Metropolitan area was to be used to finance the services assigned to the Metropolitan Council. The proposals of the Report were designed to provide a means of overcoming the difficulties that had plagued the separate municipal councils for several years. The province acted promptly on the recommendations of the Report and they formed the basis of the legislation embodied in The Municipality of Metropolitan Toronto Act, 1953.²

Creation of the Metropolitan Toronto School Board

In the field of education, it was not nearly so evident, as it was in municipal affairs, that the need for services extended across municipal boundaries. For the most part, educational programs can be conducted within a limited geographic area without regard for programs in adjoining jurisdictions, provided the unit has an enrolment large enough to justify a range of services that meets the needs of the students.

There was, however, a financial problem in parts of the Metropolitan area resulting from the demand for the construction of many additional schools to serve the children from hundreds of new housing subdivisions. The problem was of greatest magnitude in the suburban municipalities with large undeveloped land areas, especially North York, Etobicoke, and Scarborough. These municipalities found that the capital costs of new schools placed an intolerable burden on their ratepayers at a time when a majority of them were paying for their homes and when, in the absence of a balance of industrial assessment, the cost had to be borne in large part by residential assessment. In the early 1950s, the rate of grant from the province on annual payments of principal and interest on debentures issued by the municipalities to finance new schools was approximately the same as the rate of grant on approved day-to-day operating expenditures. The cumulative effect of the addition of more debentures without the retirement of any of them made some action to alleviate the problem imperative.

As has so often been the case in the historical development of administrative structures for education in Ontario, the model provided for the

²The Municipality of Metropolitan Toronto Act, 1953, Statutes of Ontario, 1953, Chapter 73, pp. 405-502.

municipal jurisdiction was applied to the educational field. The Municipality of Metropolitan Toronto Act, 1953, established a two-tier system of governance for education too. The solution to the main problem of financing the construction of schools was seen to be the utilization of the total assessment of the Metropolitan area. There is little doubt that this action made possible the provision of educational facilities in the large suburban municipalities with a good part of the cost being borne by the assessment in the built-up municipalities.

The Municipal Model and Educational Administration

The simplicity of this solution and the administrative conveniences that are associated with it have served to minimize or dismiss altogether questions about the validity and desirability of the application of the municipal model to the administration of education. The assumption that organizational structures for education should be derived from municipal patterns was challenged in the Report of the Royal Commission on Metropolitan Toronto³ in 1965, when the Commissioner recommended that there be eleven school districts not necessarily coinciding with municipal boundaries. Again, however, the ultimate decision of the provincial government was to retain a comparable administrative structure for both municipal and educational services, even though the number of local municipalities was reduced from thirteen to the City of Toronto and five boroughs.

In 1974, a Ministerial Commission stated that "There is no reason why the educational system of governance has to be a facsimile of the area of municipal government. The services and functions are demonstrably different and deserve to be treated as distinct entities".⁴ With this view we are in complete agreement.

³ Goldenberg, H.C., (Commissioner), Report of the Royal Commission on Metropolitan Toronto, Toronto, June, 1965, pp. 145-146.

⁴ Lowes, Barry, (Chm.), Report of the Ministerial Commission on the Organization and Financing of the Public and Secondary School Systems in Metropolitan Toronto, Ministry of Education, Toronto, 1974, p. vii.

Studies of Metropolitan Toronto Government

There have been numerous studies and reports on the Metropolitan area form of government. A decade after the Cumming Report, the Goldenberg Report⁵ recommended a number of changes, some of which were implemented. The Lowes Report⁶ dealt specifically with education in the Metropolitan area. The Committee on the Costs of Education had already examined the costs and financing of education in the same area as part of its more comprehensive study of all school boards in the province.⁷ The Royal Commission on Metropolitan Toronto, established in the fall of 1974, has had a number of useful and helpful background papers^{8,9} prepared for it.

It is not the intention to repeat in this Report the data provided in these documents. For detailed information reference should be made to these and other sources. We have, however, included a statement of Facts about the Public School System of Metropolitan Toronto¹⁰ as an Appendix to this Report. Statistics about the present size of the boards are provided in Table 31.

New Circumstances in 1976

The original circumstances that precipitated the establishment of the Metropolitan Toronto School Board in 1954 have changed drastically over

⁵Goldenberg, H.C., op. cit.

⁶Lowes, Barry, op. cit.

⁷McEwan, T.A., (Chm.), Financing Education in Elementary and Secondary Schools, Interim Report Number Seven, Committee on the Costs of Education, Ministry of Education, Toronto, June, 1975.

⁸Social Policy in Metropolitan Toronto, Background Studies Prepared for The Royal Commission on Metropolitan Toronto, The Commission, 145 Queen Street, West, Suite 309, Toronto, June, 1975, pp. 40-69.

⁹A Financial Profile of Metropolitan Toronto and Its Constituent Municipalities, 1967-1973, Background Studies Prepared for The Royal Commission on Metropolitan Toronto, The Commission, 145 Queen Street, West, Suite 309, Toronto, April, 1975, pp. 113-121.

¹⁰Facts about the Public School System of Metropolitan Toronto (Mimeographed) Metropolitan Toronto School Board, Toronto, December 15, 1976.

TABLE 31
SIZE OF AREA BOARDS
September 30, 1976.

| <u>Board</u> | <u>NUMBER OF PUPILS</u> | | | <u>NUMBER OF TEACHERS</u> | | |
|--------------|-------------------------|-------------|--------------|---------------------------|-------------|--------------|
| | <u>Elem.</u> | <u>Sec.</u> | <u>Total</u> | <u>Elem.</u> | <u>Sec.</u> | <u>Total</u> |
| East York | 10,010 | 5,033 | 15,043 | 426.7 | 300.5 | 727.2 |
| Etobicoke | 31,443 | 22,016 | 53,459 | 1,458.5 | 1,286.5 | 2,745 |
| North York | 60,155 | 36,198 | 96,353 | 2,506 | 2,371.5 | 4,877.5 |
| Scarborough | 54,903 | 31,755 | 86,658 | 2,483 | 1,904 | 4,387 |
| Toronto | 58,465 | 36,849 | 95,314 | 3,084.5 | 2,261 | 5,345.5 |
| York | 13,676 | 8,577 | 22,253 | 670 | 516.5 | 1,186.5 |
| Metro | | 1,303* | 1,303 | | 158 | 158 |
| TOTAL | 228,652 | 141,731 | 370,383 | 10,628.7 | 8,798 | 19,426.7 |

* Schools for Retarded are operated under the secondary school panel.

| <u>Boards</u> | <u>NUMBER OF SCHOOLS</u> | | | |
|---------------|--------------------------|-------------|-------------|--------------|
| | <u>Elem.</u> | <u>Int.</u> | <u>Sec.</u> | <u>Total</u> |
| East York | 16 | 5 | 3 | 24 |
| Etobicoke | 61 | 12 | 19 | 92 |
| North York | 116 | 29 | 20 | 165 |
| Scarborough | 105 | 16 | 23 | 144 |
| Toronto | 97 | 13 | 32 | 142 |
| York | 23 | 6 | 7 | 36 |
| Metro | | | 10* | 10 |
| TOTAL | 418 | 81 | 114 | 613 |

* Schools for Retarded are operated under the secondary school panel. In addition, integrated classes are found in 11 other locations.

the period of the last twenty-two years. Those changes are outlined briefly in the following sections.

(a) Additional School Accommodation Requirements

In the 1950s and 1960s there were extensive undeveloped land areas in Etobicoke, North York, and Scarborough. The demand for new schools to provide accommodation for rapidly increasing enrolments as a result of the development of new subdivisions in these municipalities was so great that it was almost impossible to keep up with it.

The extent of the building program is illustrated by the fact that about twenty-five years ago each of these municipalities had one secondary school. In 1976, the comparable numbers are 19, 20, and 23 secondary schools respectively. Now, Scarborough is the only municipality with any significant amount of undeveloped land and plans under way or contemplated will practically complete the development of this remainder. The other municipalities have already achieved this position. Consequently, the need for additional accommodation because of development has been substantially reduced and in some areas entirely eliminated.

Another significant factor that has reduced the demand for more school accommodation is the decline in the birth rate. Elementary school enrolment has been dropping since the beginning of the decade of the 1970s. In 1975, for example, the Board of Education for the Borough of Etobicoke had a substantial number of elementary classrooms for which it had no use. In the second half of the 1970s the impact of the decline in the birth rate will result in excess accommodation at the secondary level. There are, of course, other demographic influences¹¹ than the birth rate that must be taken into account in the development of long-range forecasts of future enrolment. While there remains the possibility of redevelopment in some of the older areas

¹¹McEwan, T.A., (Chm.) Demographic Influences on School Enrolment, Interim Report Number Four, Committee on the Costs of Education, Ministry of Education, Toronto, 1974, pp. 50-173.

and while there exists the desire to replace some existing facilities that are less than satisfactory, the need for accommodation has been largely met.

(b) Rate of Legislative Grant on Capital Payments

Expenditures for the provision of school accommodation are financed in two ways. Provision exists in The Education Act, 1974 for boards to finance permanent improvements from current funds up to a limit equivalent to one mill on equalized assessment at each of the elementary and secondary levels.¹² In the case of the Metropolitan Toronto School Board the limit is two mills on local assessment at each of the elementary and secondary levels.^{13,14} The second method is by an issue of debentures with repayment annually of principal and interest until the debenture is retired, usually over a period of twenty years.

By either method of financing, the province makes a grant on the amount of the annual extraordinary expenditure approved for grant purposes. The rate of grant in effect in 1954 was approximately the same as the rate of grant on current operating expenditures for items such as salaries, supplies, plant operation and maintenance. If that provision were still in effect, the Metropolitan Toronto School Board would be receiving approximately 30 per cent on approved capital expenditures for school accommodation. But the rate of grant on recognized extraordinary expenditure in 1974 was considerably higher. For a board of average wealth, as measured by equalized assessment per weighted pupil, the rate of grant at the elementary level was 75 per cent on the first \$60 per pupil of enrolment for grant purposes multiplied by the grant weighting factor. Any amount in excess of \$60 was eligible for grant at a rate of 95 per cent. At the secondary level, the \$60 is replaced by \$90 with the rates of grant being the same.

¹² The Education Act, 1974, Statutes of Ontario, 1974, Section 205, subsection (1).

¹³ The Municipality of Metropolitan Toronto Act, R.S.O., 1970, Chapter 295, Section 127, pp. 1340-1342.

¹⁴ McEwan, T.A., (Chm.) School Building Programs, Interim Report Number Two, Committee on The Costs of Education, October, 1972, pp. 109-112.

The actual rates of grant for the Metropolitan Toronto School Board in 1974 were 56.0 per cent and 91.2 per cent at the elementary level and 62.0 per cent and 92.4 per cent at the secondary level. Since approved expenditures for transportation of pupils were included in recognized extraordinary expenditures and since they were required in any case, they can be considered to be part of the initial \$60 and \$90 limits. They do, therefore, push approved expenditures for school accommodation into the category above those limits where they are eligible for the higher rates of grant.

While the Regulation setting out General Legislature Grants, 1976, reduces the rates of grant on approved extraordinary expenditures, they are still considerably above those in effect in 1954.

(c) Availability of Capital Funds

Before the Metropolitan Toronto School Board was established in 1954, the funds to finance school buildings had to be secured from the sale of debentures by the municipality on the open bond market. Public school boards and boards of education made known their financial requirements to their municipal councils and the latter bodies were obliged to provide the funds. Roman Catholic Separate School boards were required to issue their own debentures. As the volume of borrowing for capital purposes expanded, real problems were created. There was competition for available loan funds among municipal councils, Roman Catholic Separate School boards, universities, and other public bodies, as well as the provincial government. In addition, because some municipalities had almost reached the limits of their borrowing powers as set by the Ontario Municipal Board, or because other potential borrowers in the public sector lacked sufficient assets or were unable to provide adequate assurances of repayment, interest rates for debentures for schools reached exorbitant levels.

In the mid-1960s, the province established, first, the Ontario Universities Capital Aid Corporation, and, then, the Ontario Education Capital Aid Corporation. Henceforth, universities and municipal councils were able to sell their debentures to finance educational

buildings to each of these Corporations respectively at more favourable interest rates than they could secure on the open bond market. In effect, the province made available to these bodies the benefit of its more favourable credit rating.

Effective January 1, 1969, with the creation of the county and district school boards, all boards were given authority to issue their own debentures, with one notable exception. The Metropolitan Toronto School Board still had to go to the Corporation of the Municipality of Metropolitan Toronto to secure its funds for school buildings and this requirement continues to the present time.¹⁵ But within the expenditure limits set by the province for each school board, there has been no real problem in the marketing of debentures for essential school accommodation.

In summary, since the Metropolitan Toronto School Board was established in 1954, the major reasons for its creation have, for all practical purposes, been eliminated. The need for school accommodation has been largely met; the requirements for essential new schools have been reduced to a very low level because of the completion of development of nearly all available land areas and because of the stabilization or decline in school enrolments; the rates of grant on annual payments for school buildings have been increased sharply to the point where the province bears a large proportion of these payments; and new debentures to provide approved essential space within limits set by the province can be marketed without difficulty. It would seem, therefore, that the Metropolitan Toronto School Board served a useful purpose at the time it was created and for most of the period of the 1950s and 1960s but that new circumstances have almost completely eliminated the need that justified the Board's establishment in 1954.

Present Operation of The Metropolitan Toronto School Board

The Organization Chart of the Metropolitan Toronto School Board and the Committee Organization of the Metropolitan Toronto School Board are included as Graph 1 and Graph 2 respectively.

¹⁵Ibid, pp. 96-98.

STAFF ORGANIZATION CHART OF THE METROPOLITAN TORONTO SCHOOL BOARD

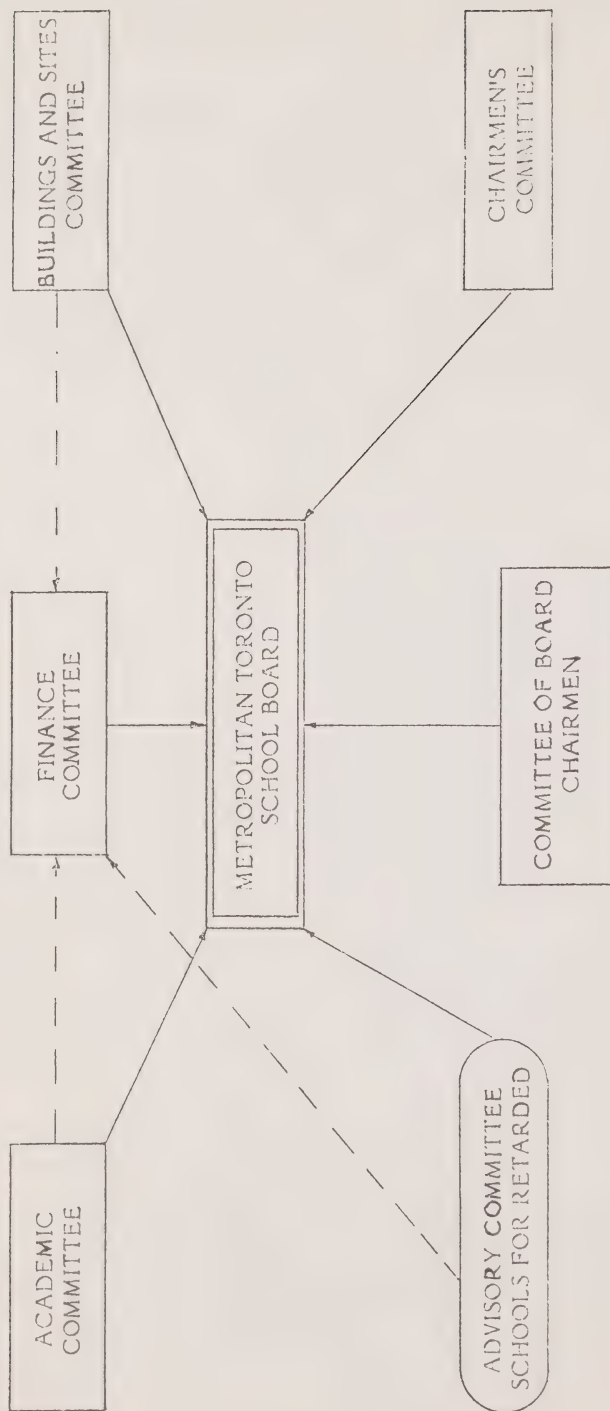
MAY 1ST. 1975



CHART 4

COMMITTEE ORGANIZATION OF THE METROPOLITAN TORONTO SCHOOL BOARD

December 15, 1976



During the period of its existence, the Metropolitan Toronto School Board has assumed additional responsibilities and has introduced new procedures that have important implications for the provision of education in the Metropolitan area. Some of these developments are examined in the succeeding sections.

(a) Schools for the Retarded

Before 1969, schools for the retarded were operated outside the provincial school system by boards of interested citizens with special grants paid to them by the province. With the establishment of the county and district boards in 1969, provision was made within the regular school system for classes for the retarded. These classes were included in the secondary school panel because the recognized expenditure per pupil at the secondary level was almost double the recognized expenditure per pupil at the elementary level. This action was appropriate because of the relatively high cost per pupil for students in classes for the retarded.

Normally the classes for the retarded in the Metropolitan Toronto area would have been taken over by the six operating boards because they had responsibility for instructional programs. However, all the classes in operation prior to 1969 were conducted by the Metropolitan Toronto Association for the Mentally Retarded. So that this Association might retain its interest and deal with a single board, the classes for the retarded were assigned to the Metropolitan Toronto School Board. In September, 1976, there were eight schools plus programs at thirteen other locations, 1303 students, 158 teachers, 20 principals, vice-principals and consultants and 78 teaching aides.

Throughout the province, the individual board operates schools and classes for the trainable retarded as part of its total responsibility for all students in the special education fields. In Metropolitan Toronto these responsibilities are divided between the Metropolitan Toronto School Board and the six area boards. The result is a substantial duplication of administrative personnel at the Metropolitan Toronto School Board to provide for the schools and classes for

the trainable retarded. This duplication occurs in areas such as the engagement of teachers, supervisory officers, purchase of equipment and supplies, provision of transportation, and maintenance of buildings. If responsibility for programs for the trainable retarded were transferred to the six operating boards, the necessary administrative and supervisory services could be provided by these boards with their existing personnel. For example, the Board of Education for the City of Toronto already administers the Metropolitan Toronto School for the Deaf and operates a special school for the handicapped, known as the Sunny View Public School. In addition, it has an extensive special education program to meet the needs of children with varying degrees of exceptionality. The boards for the five boroughs also operate special education programs and could easily assume responsibility for the schools and classes for the trainable retarded in their geographic areas.

There are other advantages that could be realized if the six constituent boards were responsible for the schools and classes for the trainable retarded. Teachers in these schools would have support services closer at hand. They could have readily available to them the advice and assistance of consultants in the local system and would have the opportunity to meet with teachers of special classes in other areas of exceptionality. They would also have the possibility of association with teachers in their communities who are in charge of regular classes and with teachers of special subjects in areas of art, music, and the like. There would also be the possibility for professional growth and development through participation in professional development programs of the local boards. In these ways, the feelings of isolation from the total educational enterprise could be alleviated or even eliminated.

(b) Continuing Demand for Expenditures for School Accommodation

In spite of the reduced need for additional school accommodation in the 1970s, for the reasons already described, there has been a continuing demand for a relatively high level of expenditures for school building programs. In the 1950s and 1960s, it was almost impossible

to provide new essential school accommodation at fast enough rate to meet the needs, much less provide any non-essential space. An organization was built up at the Metropolitan Toronto School Board level to process the many applications for new buildings. Now that the era of expansion is practically completed, it is important to ensure that the organizational structure does not exceed a level necessary to permit it to meet essential needs and that its existence does not become the reason for and source of unnecessary building projects in order to justify its continued existence.

The provision whereby the total assessment of the Metropolitan area is used to finance school building programs is now the source of some difficulty. During the 1950s and 1960s, given the circumstances of those years, this method of financing enabled boards to provide essential accommodation. Now, the arrangement is almost an invitation to extravagance on the part of the constituent boards of the Metropolitan Toronto School Board. Each board, because it knows that its ratepayers will be required to contribute to the cost of a new school built anywhere in the other five jurisdictions, is in competition to ensure that it gets its share of capital projects to which the ratepayers in the other five jurisdictions will contribute part of the cost. The attitude seems to be that if one jurisdiction gets approval for a building project then the others should submit compensating proposals. There is little doubt that this attitude has been responsible in part for a sustained demand for capital expenditures in the 1970s at a level beyond essential needs in relation to enrolment trends. It is only because in recent years the Ministry of Education has imposed limits on the expenditures a board can make for school accommodation that restraint has occurred. For example, in 1975, the Composite Capital Program approved by the M.T.S.B., was \$45,856,982. This amount was only \$2,200,000 or 5 per cent below the total requested by all area boards. The Ministry of Education was prepared to approve only \$18,416,000 or 40 per cent of the total of \$45,856,982, with only \$7,200,000 of the latter sum to be provided by the sale of debentures to the Ontario Education Capital Aid Corporation. The wide divergence between the sum approved by the M.T.S.B., and the actual allocation by the Ministry and the enrolment trends seem to indicate that the

constituent area school boards and the M.T.S.B., are unprepared to exercise more than a modicum of restraint in the amount of their proposed expenditures for capital projects. The result is that the Ministry of Education has had to become the restraining influence. Under these circumstances it is possible for the M.T.S.B., and the area boards to blame the Ministry of Education when all of the requests of their local communities are not met because of the unavailability of funds. But it is just such abdication of responsibility on the part of school boards that leads inevitably to the erosion of independence to perform the functions that should remain with boards.

In future, if each of the existing six boards had to assume responsibility for financing the part of the cost of a building project not covered by legislative grants, there would be a far greater incentive to economy and greater assurance that only essential accommodation would be provided. In addition, since any savings would be reflected in a lower tax rate within a specific municipality, taxpayers within each board's jurisdiction would be able to influence their elected representatives to ensure that restraint was exercised.

(c) Procedure for Approval of Capital Projects

The procedures for approval of capital projects under existing arrangements are unbelievably cumbersome and administratively costly. Usually, the need for school accommodation in the jurisdiction of an area board is considered by its operations and building and sites committees, or their equivalents, and a recommendation made to the area board. Normally, it is at this level that the need can be assessed best and justification for a building project determined. Because of the method of financial funding already described, rigid screening of proposals for school accommodation does not take place. Consequently, a considerable number of requests for capital projects go forward to the Metropolitan Toronto School Board.

At the M.T.S.B., requests for school construction are reviewed by staff at that level and a composite building program is developed. This program is considered by the Buildings and Sites Committee of

the M.T.S.B., and recommendations are then referred to the area boards for the consideration.¹⁶

Ultimately, any project for which approval to proceed is granted must go through the channels set up by the Metropolitan Toronto School Board. These include review of sketch plans, working drawings, and final approval of an expenditure. Similarly, the Ministry of Education must approve any project at these different steps. For all boards in Ontario, except the six area boards in Metropolitan Toronto, each board deals directly with the Ministry of Education. Consequently, an intermediate approval mechanism in the form of the Metropolitan Toronto School Board has been introduced which is no longer necessary and which adds to the administrative costs with no visible advantage.

Certain other approvals that are required by the Metropolitan Toronto School Board before an area board can act approach the absurd. For example, a Memorandum re Proposed Subdivisions for each of two subdivisions was referred, under date of January 24, 1975, from the M.T.S.B., to an area board for information about the provision of school accommodation. The two projects together accounted for an estimated total additional enrolment of 16 pupils scattered through elementary, intermediate and secondary schools. The comments of the area board were approved in September, 1975, and forwarded to the M.T.S.B. The latter Board concurred in the area board's comments on October 7, 1975, and directed that the Ministry of Housing and the Metropolitan Toronto Planning Department be advised of this concurrence.¹⁷

In another example, the North York Board of Education made application to the M.T.S.B., for approval to lease one regular grade classroom at Finch Public School to the Toronto and District Parents Cooperative Preschool Corporation for an office. This request had to go through the whole bureaucratic procedure, including a meeting of the Metropolitan Toronto School Board. The matter was reported in three-quarters

¹⁶ Minutes of the Metropolitan Toronto School Board, Tuesday, March 11, 1975, pp. 106-112.

¹⁷ Minutes of the Metropolitan Toronto School Board, Tuesday, October 28, 1975, p. 407.

of a printed page of the Minutes of the M.T.S.B.¹⁸ The lease was finally approved on a motion of two trustees from the North York Board of Education which had dealt with the matter previously at the area board level. The procedure described is merely illustrative of the administrative hoops through which many matters dealing with school accommodation are put before decisions can be finally reached.

(d) Responsibility and Accountability of Trustees

The two-tier structure for the governance of education in the Metropolitan area places trustees in an untenable position in terms of accountability to their constituents. Two examples will illustrate the problem.

Under existing arrangements for the financing of current operating expenditures, the relevant data for the six constituent boards are combined under the Metropolitan Toronto School Board. Consequently, assessment, enrolment, staff, etc., at each of the elementary and secondary levels are considered as if they applied to one board - The Metropolitan Toronto School Board - and these data are used by the Ministry of Education in the determination of the rate and amount of grants to be paid in total to the Metropolitan Toronto School Board. The Ministry also provides an assessment equalization factor and grant and expenditure weighting factors as if the whole of Metro was under a single board. In 1974, the assessment equalization factor was 24.6; the grant weighting factor at the elementary level was 1.109, at the secondary level 1.065; the expenditure weighting factor at the elementary level was 1.257, at the secondary level 1.161. Since then, the expenditure weighting factors have been dropped by the Ministry.

The composite budget in 1976 for the Metropolitan Toronto School Board and the six area boards of education totalled \$686,963,687, for both current operation and capital purposes, including repayment of principal on debentures and interest payments on debenture debt. Of this sum, provincial grants were to provide \$189,300,000, or 27.55 per cent while \$444,338,802, or 64.68 per cent was to be derived from local

¹⁸Minutes of the Metropolitan Toronto School Board, Tuesday, August 19, 1975, p. 370.

property taxes. The remaining amount of \$53,324,885, or 7.77 per cent, was derived from fees and other revenue.

Unlike other boards in the province, which receive their funds direct from the municipal councils and the Ministry of Education, the six area boards and the Metropolitan Toronto School Board must have the total revenues from all sources allocated to them from the M.T.S.B. The means by which this allocation is made are unbelievably complex and challenge the Grant Regulation of the province in terms of their ability to deny comprehension to school trustees and the public. When the provisions of the M.T.S.B., distribution formulae are added to the provincial legislative Grant Regulation, the combination achieves the ultimate in obscurity. Consequently, most trustees are unable to explain in anything but the most general terms the justification for the allocation of funds to their area boards. That the system is fair and equitable is largely a matter of acceptance, without much understanding, on the part of trustees.

Understanding is not enhanced by the procedures used to achieve the distribution referred to above. Responsibility for recommending the means of allocation of funds among the seven boards is given to a Budget Formulae Review Committee. An official of the Metropolitan Toronto School Board serves as chairman of the Committee. The remaining members are a second senior official of the M.T.S.B., and a senior official of each of the six area boards. The Committee has no less than thirteen sub-committees made up of superintendents and financial officials representing the area boards and the Metropolitan Toronto School Board. Each area board has one representative on each sub-committee together with a representative of the Metropolitan Toronto School Board. A representative of the latter board serves as Chairman of each sub-committee. In the case of one of the smaller area boards, a particular official serves on at least six sub-committees. Each sub-committee produces a report after a review of the operation of the previous year's formulae. For 1975, the reports of these sub-committees setting out the recommendations for the current year run to more than 150 pages. Included in these documents is the formulae for each sub-committee, some of which are refined to the level of the ridiculous.

The recommendations of the thirteen sub-committees are reviewed by the Budget Formulae Review Committee. When the Budget Formulae Review Committee has recommended the formulae for the next year, its recommendations and those of its sub-committees are reviewed by the Committee of Financial Officials. When the latter body has endorsed the Report of the Budget Formulae Review Committee and its sub-committees, the recommendations go to the Advisory Council of Directors. Recommendations then go to the Metropolitan Toronto School Board. The proposed formulae are then sent to the area boards for their consideration.

The process for determination of the allocation of funds among the area boards has the following results:

- (i) Trustees are not involved in the procedures until the final recommendations are presented to the Metropolitan Toronto School Board. Even then, only the small number of representatives from the area boards to the Metropolitan Toronto School Board, are involved.
- (ii) When the recommendations reach the area boards, most school trustees are not in a position to ask intelligent questions about the complicated formulae presented to them. Theoretically, each area board could decide not to adopt the formulae. There is, therefore, supposed to be local autonomy in the matter. Practically, since no trustee really understands the detail of the formulae, he or she can do little else but "rubber stamp" the recommendations. The fact that the formulae are referred to the area boards at all perpetuates the fiction of freedom of choice at the area board level where none in reality exists.
- (iii) The criticisms in the two preceding paragraphs cannot be overcome by involvement of trustees in the existing procedures. In the first place, trustees do not have the time to devote to the development of these complicated formulae. Nor do they have the knowledge or expertise to perform the task. The result is an almost complete abdication of responsibility to the officials. Under the organizational and administrative structures that now exist, this outcome is inevitable. No matter how competent the officials may be, and there is no suggestion that they are other than highly competent, the system that

creates this situation is faulty in the extreme. It places elected representatives at the mercy of their staffs while holding them responsible and accountable to the electorate for results that they cannot in fact influence and about which they know little or nothing. When to these criticisms is added the question of necessity, or even desirability, of the whole exercise, it is time that changes were made.

The claim that the Grant Regulation for the province is crude in terms of its ability to differentiate among the needs of the area boards within Metro has been used to justify the complicated procedure described above. This claim requires documentation in terms of the quality of education provided in the different jurisdictions. Even if it can be substantiated, there will still remain the question of the cost in terms of the functioning of the democratic process. In any case, the Grant Regulation of the province purports to differentiate among the needs of many boards in the province with far greater differences than exist among the boards in Metro. Undoubtedly, the provincial Grant Regulation requires improvements. All the boards in Ontario should make their views known about the manner in which the goal of equitable treatment of boards can be achieved rather than superimposing additional procedures on top of the existing Grant Regulation. It is characteristic that in an endeavour to refine to the *n*th degree the procedures for distribution of grant moneys to meet all possible situations, an administrative monster is created that becomes incapable of functioning in response to the needs of children and the requirements of a democratic and representative policy-making body.

A second example of lack of responsibility and accountability of trustees is the procedures for the negotiation of board-teacher contracts. An early justification for the Metropolitan Toronto School Board was that it would forestall the "whip-lash" effect of a settlement with one area board on another area board. While that concept undoubtedly had some validity in previous negotiations, circumstances have now changed to the point where it is of little or no significance. If the "whip-lash" effect is operative in 1975, it has been generated

by settlements in Windsor, Carleton, Ottawa and Durham.

In any case, the procedures used in the salary negotiations in 1975 have effectively eliminated all the trustees except the Chairmen of the six area boards from any direct involvement in, or indeed knowledge of, developments in the negotiating procedures. This is not intended to be critical of the efforts of the Chairmen to inform their area boards about the state of negotiations. It is critical of the organizational structure within which the Chairmen are forced to operate.

There is real confusion as a result of the attempt to impose the industrial model on negotiations in the public sector. The requirement of secrecy on the part of management, as represented by the Chairmen, ignores the fact that all trustees are elected representatives of the people. The lead editorial in the issue of the Globe & Mail for October 14, 1975, criticizes the fact that the public is not aware of the state of negotiations with the secondary school teachers. If it were generally known that most trustees are similarly "in the dark", there would be real cause for even greater concern. The fact that elected representatives are not permitted to know of public business, which they were elected to deal with, is repugnant to the democratic process. At the same time, appointed officials who advise the Chairmen are privy to knowledge of developments which they are unable to reveal to the members of the area boards which employ them.

The anomaly is that those trustees who had no part in or knowledge of the negotiations while they were in progress will ultimately be held accountable by their ratepayers for the decisions arrived at in secret negotiations. It will be argued that the area boards do not necessarily have to ratify any proposed contract settlement but again that is a theoretical right devoid of any practical implementation.

Most of the difficulties described above could be eliminated, or at least alleviated, if each existing area board were free to conduct its own negotiations as are all other boards in the Province.

(e) Some Problems of the Administrative Structure

The two-tier structure for the governance of education in the Metropolitan Toronto area makes inordinate demands on the time of trustees and officials of the area boards. Each trustee serves on the board and committees for his area board. Those who are elected by their fellow trustees to serve on the Metropolitan Toronto School Board must attend Board meetings and meetings of the committees to which they are elected. Normally, the Board and each of its three major standing Committees meet twice monthly. Membership on the Committee of the Board Chairmen is a most demanding and time-consuming position, particularly when that body has responsibility for the conduct of negotiations with the teacher groups on a Metro-wide basis.

Senior officials of the area boards must also devote a considerable proportion of their time to the activities of the Metropolitan Toronto School Board. They serve on committees, sub-committees, and *ad hoc* committees, to which reference has already been made. Because the implications of any decision of a committee may be highly significant for an area board, it is imperative that its representative be present if for no other reason than to protect and promote the interests of the area board that employs him. For the most part, those interests must be the interpretations that the official decides are best for his area board without any prior input by or consultation with the elected trustees of his area board. A substantial proportion of the time of senior officials, who are in the highest salary bracket, is spent in activities of the M.T.S.B., while the whole cost of the salaries are paid by the area boards. If it could be shown that the allocation of so much time could be justified in terms of advantages to the educational system in the area board jurisdictions, there would be some justification for involvement. The loss of time of these officials to their own boards undoubtedly has a negative impact on the ability of these boards to deliver quality education in their jurisdictions. If these officials could devote their full energies to the development and implementation of sound educational practices, they could exert a positive influence not now available to their area boards, teachers and pupils.

In summary, trustees and officials should be directing their knowledge, energy, and expertise to the improvement of education in the jurisdictions in which they were elected to serve. Those abilities should not be dissipated by participation in activities that under present circumstances are, if not detrimental to enhancement of good education, at least unnecessary or remotely peripheral to the attainment of that objective.

When the Metropolitan Toronto School Board is now merely the vehicle for the exercise of administrative bureaucracy, when it is shown to be detrimental to the exercise of autonomy by elected trustees in the area board jurisdictions, when it results in the abdication of the decision-making responsibility to appointed officials, when it results in trustees being held responsible and accountable without the right to decide the issues on which they are judged, it is no longer possible to justify its continued existence. Certainly, the Metropolitan Toronto School Board no longer represents an economical use of the time spent on it by trustees and officials, it does not provide an adequate return for the costs of its operation, and it does not function as an adequate vehicle for the democratic governance of education. Any functions, now performed by the M.T.S.B., that should be continued could be assumed by the area boards with considerable economy of time and effort by trustees and officials, with substantially reduced costs, and with a far more responsible and representative form of government.

Relationship Between Metropolitan Toronto School Board and Ministry of Education

A considerable amount of publicity has been given to the political "clout" that the Metropolitan Toronto School Board, because of its size, has in its dealings with the Ministry of Education. The Lowes Commission expressed this point of view as a justification for the continuance of the Metropolitan Toronto School Board in these terms: "Concerned by the increasing power and control by the Ministry of Education, all the Area Boards felt strongly that the "clout" needed in dealing with the Ministry was only possible when all the boards in Metro hung (sic) together".¹⁹

¹⁹Lowes, Barry, op. cit., p. 59.

There are a number of questions that this point of view raises. First, does this mean that the Metropolitan Toronto School Board can force concessions from the Ministry that would not be legitimately granted if the Metropolitan Toronto School Board did not exist? There is some evidence to support the conclusion that this is so. For example, in 1973, the Metropolitan Toronto School Board was permitted to exceed the ceilings and was given an interest-free loan by the Province to permit it to do so on the understanding that the excess amount would be incorporated into the ceilings in 1974.

A second example has to do with the amount of the ceilings in 1975. The increase over 1974 of 13 per cent per pupil at the elementary level plus an additional \$80 per pupil was considered adequate by the great majority of elementary school boards, including those in Metropolitan Toronto. But because of a demand by the Metropolitan Toronto School Board and a few other boards that the 13 per cent was inadequate at the secondary school level, the Ministry raised the ceilings at the secondary level by an additional \$50 per pupil. To avoid criticism that the "gap" between the ceilings for the elementary level and the secondary level should not be widened, an additional \$50 per pupil was provided at the elementary level as well. Whatever may have been the justification for an additional increase of \$50 per pupil at the secondary level, it did not apply at the elementary level. The actual increases over 1974 are shown in Table 32.

TABLE 32
INCREASE IN BASIC CEILINGS FOR 1975 OVER 1974

| | <u>1974</u> <u>Elementary</u> | <u>Secondary</u> |
|------------------------|----------------------------------|-------------------|
| Basic Ceiling | \$704 | \$1,231 |
| | <u>1975</u> | |
| Original Increase | \$704 + 13% = | \$1,231 + 13% = |
| | \$704 + \$92 = | \$1,231 + \$160 = |
| | \$796 | \$1,391 |
| | plus \$80 = | |
| | \$876 = 24.43% | |
| Supplementary Increase | \$876 + \$50 = | \$1,391 + \$50 = |
| Basic Ceiling | \$926 | \$1,441 |
| Total Increase | \$222 = 31.53% | \$210 = 17.06% |

Consequently, additional funds at the elementary level were made available to all boards in Ontario so that the amounts finally provided were in excess of needs. It is true that boards do not have to spend at the maximum level permitted by the ceilings but strong pressures are always exerted to spend up to the levels permitted by the ceilings. The figures shown in Table 32 are the basic ceilings which are subject to the addition of a grant weighting factor and an expenditure weighting factor for each of the elementary and secondary levels, as shown in Table 33. The weighting factors for the Metropolitan Toronto School Board are among the highest in the province. In 1975, the grant weighting factor of 1.1312 at the elementary level permitted an additional expenditure of \$121 per pupil to a total of \$1,047 per pupil with the whole amount of \$1,047 eligible for grant. In addition, the expenditure weighting factor of 1.2570 permitted a still further expenditure of \$117 per pupil to a total of \$1,164 but the amount of \$117 was not eligible for grant so that the whole additional \$117 had to be borne by property taxes.

TABLE 33
METROPOLITAN TORONTO SCHOOL BOARD
WEIGHTING FACTORS AND CEILINGS
1974 and 1975
(To nearest dollar)

| | <u>Elementary</u> | | <u>Secondary</u> | |
|------------------------------|-------------------|-------------|------------------|-------------|
| | <u>1974</u> | <u>1975</u> | <u>1974</u> | <u>1975</u> |
| Basic Ceiling | \$704 | \$926 | \$1,231 | \$1,441 |
| Grant Weighting Factor | 1.109 | 1.1312 | 1.065 | 1.0712 |
| Grant Ceiling | \$781 | \$1,047 | \$1,311 | \$1,544 |
| Expenditure Weighting Factor | 1.257 | 1.2570 | 1.161 | 1.1610 |
| Expenditure Ceiling | \$885 | \$1,164 | \$1,429 | \$1,673 |

At the secondary level the basic ceiling was \$1,441 in 1975. The grant weighting factor was 1.0712 which permitted an additional expenditure of \$103 per pupil to a total of \$1,544 per pupil, all of which was eligible for grant. The expenditure weighting factor of 1.1610 permitted a still further expenditure of \$129 per pupil for a total of \$1,673 with the

amount of \$129 per pupil to be raised wholly by property taxes.

It is evident that the grant and expenditure weighting factors applicable to the Metropolitan Toronto School Board are designed to accommodate a high level of expenditure considerably in excess of the levels permitted for nearly all other boards in Southern Ontario. There is little evidence to justify the conclusion that the educational problems confronted by the Metropolitan Toronto School Board and its area boards are any greater proportionately than those facing other school boards in Ontario.

If the Metropolitan Toronto School Board and its Area Boards consider that there is "increasing power and control by the Ministry of Education", the answer to the problem does not lie in the maintenance of one large unit to challenge the Ministry of Education for its own purposes. Rather, the boards in the Metropolitan area should act in consort with all the other school boards in Ontario. Certainly, other boards have an interest in the maintenance of their freedom of action and little will be accomplished in this direction if the Metropolitan Toronto School Board achieves greater freedom and autonomy from the Ministry while the remaining boards are subject to more centralized control from the Ministry.

At the same time that the Metropolitan Toronto School Board and its area boards are concerned about their freedom and autonomy from the Ministry, the area boards should be concerned about their loss of independence to the Metropolitan Toronto School Board. We have already indicated that the area boards and their trustees are subject to stringent limitations by the Metropolitan Toronto School Board. The question arises about the degree of freedom of action of the area boards in relation to the Metropolitan Toronto School Board. Certainly, the area boards under the Metropolitan Toronto School Board have far less freedom of action to meet the educational needs in their particular jurisdictions than do boards in, for example, Hamilton, Ottawa, London, Windsor, Peel, and Simcoe County which do not have a two-tier organization for the administration of education.

Size of Administrative Organization for Education

It has been stated²⁰ that two of the area boards in the Metropolitan Toronto area - those for the Borough of York and the Borough of East York - are too small to justify their continued existence and that they should be incorporated with large boards to form four area boards. It is true that a school board should have a large enough enrolment to permit it to provide a spectrum of programs and courses to meet the varied abilities, interests, and needs of its students. But the administrative unit should also be small enough to be responsive to the wishes of the parents, rate-payers, and representative organizations within its jurisdiction. There is no objective evidence to support a conclusion that four large units would achieve a balance that would improve either the educational program or the accessibility of the public to their elected representatives. Indeed, the Goldenberg Report²¹ recommended that there be eleven school districts and the Lowes Commission Report²² recommended a reduction in the size of the jurisdictions of the boards for the Borough of North York and the City of Toronto.

The North York Board of Education already has the largest enrolment of any board in Ontario. The Toronto Board of Education is the second largest and is slightly larger than the Metropolitan Separate School Board. The Scarborough Board of Education is next in size and the Etobicoke Board of Education is exceeded in enrolment by only one other board - the Peel Board of Education. Consequently, the four jurisdictions in Metropolitan Toronto are already among the six largest boards in Ontario. The Borough of York Board of Education has an enrolment comparable to a large number of other boards in Ontario and there are many boards with fewer students than the Borough of East York Board of Education. The enrolment of the Metropolitan

²⁰ Submission of the Board of Education to The Royal Commission on Metropolitan Toronto, January, 1976.

²¹ Goldenberg, H. C., (Chm.), Report of The Royal Commission on Metropolitan Toronto, June, 1965, p. 146.

²² Lowes, B., (Chm.), Report of the Ministerial Commission on the Organization and Financing of the Public and Secondary School System in Metropolitan Toronto, Ministry of Education, Toronto, 1974, p. 113.

Toronto School Board and the Metropolitan Separate School Board together total almost 470,000 students or approximately 25 per cent of the total number of students in Ontario.

It is significant that of all the Regional governments established in Ontario since the formation of the Municipality of Metropolitan Toronto, none has adopted the two-tier organizational structure for the governance of education, in spite of the introduction of this system for the delivery of municipal services in the same areas. In the latter case, as has already been shown, it is relatively easy to differentiate among the services that can be assigned to each of the two levels of government. No such possibility exists in the single service of education. Any division of responsibilities between the two levels is bound to result in lack of clarity of function and misunderstandings and conflict about jurisdictional responsibilities. In addition, the impact on the child is likely to be less positive than if one school board had total responsibility for the quality of education in its area. The relationship between a particular school and its community leaves little room for the involvement of a remote body represented by the Metropolitan Toronto School Board in the determination of any matters that may impinge on the accountability of elected representatives to the people of the community.

It is our view, therefore, that emphasis should now be placed on the restoration of the responsibility, authority, independence, and accountability of the existing area boards in the Metropolitan area to the level now exercised by all other school boards in Ontario. This can be achieved by the abolition of the Metropolitan Toronto School Board and the continuance of the six area boards, each with total responsibility for education within its jurisdiction.

CHAPTER 8

SCHOOL YEAR

Until 1973, the school year and the allowable holidays for elementary and secondary schools were designated in The Schools Administration Act.¹

Provision also existed for some variation in the school year and holidays to meet special circumstances in a rural area and in a territorial district. With some minor changes over the years, these conditions had been in effect in Ontario for many decades.

Under the Act, the school year for elementary and secondary schools consisted of three terms. The first term commenced on the day following Labour Day and ended on December 22, except that, when December 22 was a Monday, the first term ended the preceding Friday. The second term began on January 3, except that if January 3 was a Friday, the term began on the following Monday. It ended on the Friday preceding March 21. The third term began on the second Monday following the end of the second term. This provided one week of holidays between the two terms. The third term ended on June 30, except that, where June 30 was a Monday or a Tuesday, the term ended on the preceding Friday.

The holidays, as specified in the Act, included every Saturday and Sunday; every day proclaimed a public holiday by the authorities of the municipality in which the school was situated; every day on which the school was closed under The Emergency Measures Act, The Public Health Act, or The Department of Education Act, or the regulations; a day approved by the inspector for a teachers' institute or conference; a day appointed by the Governor General or the Lieutenant Governor as a public holiday or for thanksgiving; the birthday of the reigning sovereign or the day fixed by proclamation of the Governor General for the celebration of the birthday of the reigning sovereign; Good Friday, Easter Monday, Victoria Day and Remembrance Day.

The existence of external examinations for students in Grade 13 meant that regular classroom instruction for students in this grade traditionally

¹The Schools Administration Act, R.S.O., 1970, Chapter 472, Section 4.

terminated at the end of May. The month of June was devoted to the administration of the examinations. Consequently, students were present only on those days when they had scheduled examinations. The remaining time could be devoted to intensive study for examinations yet to be written. For the most part, subjects with the lowest enrolments provincially were scheduled for the latter part of June. Some teachers were involved as presiding officers for the examinations in Grade 13, some others were involved in evaluation of examinations of students in other grades, while still others were free of any duties. The necessity to hold the Grade 13 examinations in the secondary schools often resulted in students in Grades 9 to 12 inclusive being dismissed. As a result of these circumstances, many secondary school teachers had minimal requirements on their time during the month of June. At the elementary school level, however, teachers were required to maintain their regular schedule and to teach until the final school day in June.

In 1968, the external Grade 13 examinations were discontinued. The numbers of students had become so great that it was administratively impossible to conduct the examinations during the month of June, get all the papers marked, and the results announced in time to meet the fall registration requirements for the universities and other post-secondary institutions. In addition, the costs of administration of the external examinations had become prohibitive and there was a growing sentiment that Grade 13 could be made a more valuable educational experience if the external examinations were terminated. Questions were also being raised about the validity of the marking procedures used to determine the level of standing for students.

With the discontinuance of the Grade 13 external examinations, the justification for the release of secondary school teachers from regular instructional duties at the end of May was removed. Elementary school teachers took the position that there was no longer any difference that would justify secondary school teachers being relieved of regular duties at the end of May. The choices seemed to be between a longer instructional period for secondary schools and a shortening of the school year for elementary schools.

In 1968, the Department of Education established June 11, as the earliest date on which secondary school classes could be dismissed from regular

instruction. This decision met with strong objection from many secondary school teachers. Their students claimed that the later dismissal date would limit the possibility of summer employment because most positions would already be filled by students at the post-secondary level as a result of the earlier dismissal date of institutions at that level. The situation presented a real problem for the Department of Education.

In 1972, the Minister of Education appointed a Task Force to study the length of the school year and school closing dates and to make recommendations to him. The Task Force identified "the essential elements of the problem as being covert, subliminal, and volcanic".² The Report of the Task Force resulted in a number of changes.

Authority for Determination of School Year

By an amendment to The Schools Administration Act, 1973, the direct statutory authority for determination of the school year and school holidays was removed. In its place, the Minister of Education was empowered, subject to the approval of the Lieutenant Governor in Council, to make regulations under The Ministry of Education Act governing these matters. In Regulation 546/73,³ each school board is required to designate each day of the school year as an instructional day, a professional activity day, or a school holiday. Each board is required to prepare, adopt and submit to the Minister on or before the first day of May, for the ensuing school year, the school calendar or school calendars to be followed in the schools under its jurisdiction. The list of holidays is practically the same as under the former statutory provisions.

The justification for requiring each board to prepare its school calendar lies in part with the desire to provide a greater degree of freedom for school boards. But the procedures used preclude the attainment of this objective. The beginning and ending dates for the school year are set by the Regulation. So, too, are the number of holidays, and for most holidays the

²Report Task Force the School Year, (mimeographed), September 1, 1972, p.3.

³School Year and School Holidays, Ontario Regulation 546/73, made under The Ministry of Education Act, Queen's Printer for Ontario, 1973.

actual dates are specified, as would be expected. In the areas where a board has any flexibility, its decisions are required to be reported to the Minister and are subject to his approval. In effect, the Regulation gives the appearance of some decision-making authority at the local level without actually granting it. Two negative results, however, are that school boards must go through the exercise of dealing with the matter each year and its administrative officers must report the results to the Minister. In addition, officials within the Ministry of Education must process the calendars for all boards in the province and forward an approval to each board. This is a wasteful process both in terms of time and money.

In our view, the new procedures do not grant any real measure of authority and responsibility to local boards, they involve boards in administrative trivia at the expense of consideration of more significant educational issues, and they add unnecessarily to the paper work of officials at both the board and Ministry levels. Their only real justification seems to be that they transfer responsibility for a difficult decision from the Ministry of Education to school boards. We hold the view that the determination of the school year and school holidays is a matter that should be decided by the Ministry of Education through the Regulation and that assumption of that responsibility by the Ministry is no more a centralizing action than handing it to school boards is a decentralizing one. There are certain matters that should be determined by the central authority and this is one of them. Other reasons for our view in this matter are set out below.

Professional Activity Days

Regulation 546/73 defines "professional activity" to include evaluation of the progress of pupils, consultation with parents, the counselling of pupils, curriculum and program evaluation and development, professional development of teachers and attending educational conferences. A "professional activity day" is defined as a school day that is designated as a day for professional activities on a school calendar.

The major change incorporated in Regulation 546/73 was a provision that required a minimum of 185 instructional days. Formerly, no distinction existed between school days and instructional days but one day could be

set aside for a teachers' institute or conference. The requirement of 185 instructional days means that the one day allowed could be increased from nine to twelve professional activity days depending on the calendar and the decision of each board. For example, in the school year 1973-74, there were 197 school days so that the maximum number of professional activity days was the difference between the required minimum of 185 instructional days and 197. In 1974-75, the number of school days was 194 so that the maximum number of professional activity days was nine. For 1975-76, it was again the maximum of 12 days.

This action that permitted an increase in professional activity days from one to from nine to twelve depending on the calendar for a specific school year has the effect of reducing the number of instructional days for elementary school pupils. Each year the school board must determine the number of professional activity days to be permitted. The fact that the Ministry of Education sets the minimum number of instructional days at 185 carries the implication that no greater number is required for this purpose. Consequently, each school board is under extreme pressure from its staff to declare all school days in excess of 185 as professional activity days. The assumption that no more than 185 instructional days are required is invalid for a number of reasons.

(a) Preparation of Teachers

It is somewhat anomalous that, eight to ten years ago when students who had completed Grade 12 and had taken one summer of professional preparation became teachers in the elementary schools, one day was allowed under The Schools Administration Act for a teachers' institute or conference. Now, when almost all new entrants to the profession at the elementary level are required to have a Bachelor's degree, it is considered necessary to have nine to twelve days for professional activities. The reasoning seems to be that the teacher is no longer required as a condition of his employment to accept personal responsibility for maintenance or improvement of his professional competence. It is recognized that there are some considerations in curriculum development for a particular system or school that require some time for professional activities beyond maintenance of professional competence but nine to twelve days is in our judgement excessive in the extreme.

(b) Cost of Professional Activity Days

In recent years the total cost of elementary and secondary education has exceeded two billion dollars per year. If from this figure is deducted the annual costs associated with the payment for school buildings, the cost in 1975-76 is still in excess of two billion dollars. If, in round figures, the number of school days is placed at 200, the cost per day of operating Ontario's elementary and secondary schools is at least \$10 million per day. The cost for nine to twelve professional activity days is, therefore, from \$90 million to \$120 million per year. It would be a bold person indeed who would contend that value is received for that level of expenditure.

(c) Provision for Pupils

At the elementary school level real hardships are imposed on many families because of the release of their children from school so that teachers can participate in professional activity days. For a number of reasons that it is unnecessary to enumerate here, more and more mothers are involved in the work force. Because the school week normally coincides with the parents' work week, it is possible for many working parents to fulfill most of their working commitments while their children are at school. But when the school time is reduced by nine to twelve days a considerable burden is imposed on a working family to provide supervision for their children in the parents' absence. It can be argued that the school does not exist to provide a "baby-sitting" service for working mothers and that parents have a responsibility to provide proper supervision for their children regardless of the function of the school. While both of these contentions have considerable validity, they do not realistically take into account the circumstances and conditions that account for both parents being in the labour force. For example, in the present economic climate, and particularly because of the impact of inflation, both parents are often required to work to support their families. In other cases, a single parent is the sole support of the family. In still other examples, both parents are desirous of participating in the self-fulfilling role that employment out of the home provides. Even where the working

parents are prepared to provide day-care, there is such a shortage of adequate facilities for this purpose that they are unable to secure them for their children. Even more difficult is the possibility of securing proper supervision for occasions when the schools close for professional activity days spasmodically throughout the school year.

(d) Reduction in Instructional Time

But perhaps the most significant impact of the professional activity days for the elementary school child is the reduction in the time available for instruction. While the teacher's involvement in some professional activity days may improve his competence and professional performance, it is questionable whether the result of this improvement comes near compensating for the loss of from nine to twelve days of instructional time each year. The cumulative total of professional activity days over the school career of a child from junior kindergarten to the end of Grade 13 amounts to about three-quarters of a whole school year. In these times when there are criticisms of the accomplishments of the school in the inculcation of the basic skills, knowledge and values, the teaching profession has a responsibility to show that the allocation of nine to twelve days to professional activity days is justified in terms of the quality of education available to its pupils. This is an area where research is sorely needed, using an experimental setting to provide the necessary data. There is evidence to indicate that the definition of professional activity is being interpreted in some jurisdictions to include activities that do not remotely correspond to those listed in the Regulation and that should more properly be classified as part of the teachers' regular duties. Until positive evidence that justifies the allocation of this time to professional activity days is available, the schools should revert to the maximum utilization of the time available for instructional purposes.

Mid-Term Break

School boards now have authority under the Regulation to designate five consecutive school days for a mid-winter break. Again, the decision to

grant authority to boards to determine the dates when schools are closed for this purpose is intended to increase the decision-making authority of school boards. In practice, the effect in this direction is minimal since there is a relatively narrow range of dates when the mid-term break can be set. While the Regulation permits a choice by a board of five consecutive days between the first school day in January and the last school day in June, this suggests a degree of leeway that in practice is almost non-existent. By definition, a mid-term break does not come at the beginning or the end of a term. It is not difficult to imagine the reaction of parents if any board were so unwise as to declare the first five school days in January as the mid-term break! Consequently, where no choice really exists in practice, it can hardly be said that a choice does in fact exist at all.

Usually, the mid-term break is scheduled just after mid-March, as might be expected. The Regulation and the Ministry of Education in Memorandum 94⁴ suggest that the mid-winter break in 1975-76 be from March 22 to March 26, 1976, both days inclusive. There is, however, room for confusion when the responsibility rests with local boards. For example, the children of Roman Catholic Separate School supporters, some of whom attend a Roman Catholic Separate School at the elementary level and some others of whom attend a secondary school under a Board of Education in the same municipality, may find that the mid-term break is set at a different times by the two boards. The result is that all the children of the same family are not free from school during the same week. This can also happen when some children in the same family attend a Public School in the school board jurisdiction where they live while other children in the same family attend a secondary school in an adjoining or other school board jurisdiction.

The responsibility to determine the dates for the mid-term break adds little or nothing to the independence of school boards. As a matter of fact it may involve the boards in administrative trivialities that may take valuable time from more substantive issues about which the board should be concerned. The granting to school boards of responsibility in this area is mere tokenism in so far as board independence is concerned. It is sometimes cited as

⁴Memorandum School Year and Holidays 1975-76 - Form 94, Ministry of Education, Toronto, January, 1975.

an indication of support of the principle of greater authority to school boards to counteract criticism that the power of decision-making in areas that really matter in education are being denied to school boards.

It is our view that there are certain areas where the Ministry of Education should retain responsibility and authority. The determination of the dates for the mid-term break is in this category. It seems to us that the Ministry of Education by Regulation should establish dates close to the middle of March for the mid-term break so that all schools will be closed for the same five days.

Examinations

At the secondary school level provision is usually made for two or three sets of formal examinations during the school year. The number of school days used for this purpose varies considerably from school to school. But there are schools that use as many as 21 days of the minimum number of 185 teaching days for this purpose. In 1975-76, of the total of 197 days, therefore, twelve days may be devoted to professional activity days and 21 days set aside for formal examinations, leaving 164 days when regular classes are in operation. It is inevitable that a good proportion of the staff of a secondary school will not be on duty during examination periods since not all teachers are required at any one time to supervise those students who are writing examinations. This is a highly wasteful and inefficient method for the evaluation of pupil progress.

In so far as the preparation for and writing of examinations are learning experiences, a case can be made for them. But it must be recognized that the time devoted to the writing of formal school-wide examinations is taken from the time available for new learnings and expanded programs. There does not seem to be any plausible case to be made for the superiority of formal school-wide examinations to the exclusion of continuous evaluation through periodic class tests administered by the regular teacher during his scheduled class period with a particular group of pupils. Indeed, in terms of evaluation of a pupil's progress and the opportunity to undertake remedial or corrective teaching as a result of early identification of a pupil's difficulties, class tests have much to commend them over

formal school-wide examinations. Certainly, from the standpoint of efficient use of the limited instructional time available and the necessity to enable students to achieve at the highest level of their potential, it is difficult to justify the use of up to 21 days for formal school-wide examinations.

CHAPTER 9

SALARIES AND OTHER ALLOWANCES TO SCHOOL BOARD MEMBERS

For more than one hundred years in Ontario, school trustees served without salary. Throughout this whole period, school boards were able to attract to their membership, by either election or appointment, citizens who were willing to serve their communities without financial gain to themselves and often at considerable personal sacrifice in terms of time and money. Many of the most significant and positive accomplishments in Ontario education were the result of the contributions of these public-spirited citizens.

Provisions for Payment of Allowances to Trustees

As in so many aspects of society, changes that occurred following World War II brought with them a demand for payment to members of school boards for their services. The payment of salaries to municipal councillors was used as an argument for similar treatment for school trustees. Increase in the size of school board jurisdictions, represented by high school districts and township school areas, required that more time be devoted to the role of trustee. The absence of any payment to trustees was said to confine candidacy to those who had personal means to enable them to serve as trustees and to deny membership to many parents and other ratepayers whose incomes were insufficient to permit them to make the sacrifice of time and money required.

As early as 1941, Section 15 of The Public Schools Act was amended to permit the board of school trustees for a township school area to pay to each trustee a mileage allowance not exceeding seven cents for each mile necessarily travelled by him in going to the meetings of the board from his home and returning to his home, provided that no such allowance was to be paid in respect of more than eight meetings in any year.¹ In 1949, a further amendment to the same Act² permitted the board of a township school area to pay

¹The School Law Amendment Act, 1941, Statutes of Ontario, 1941, Chapter 52, Section 12.

²The Public Schools Amendment Act, 1949, Statutes of Ontario, 1949, Chapter 84, Section 1.

to each trustee a sum not exceeding \$5 for each of not more than twelve meetings attended by the trustee in any one year. The mileage allowance could be extended to all meetings from the earlier allowance of eight meetings.

In 1954, The Secondary Schools and Boards of Education Act³ was amended to permit the board of a high school district comprising two or more municipalities or parts thereof to pay allowances to its members comparable to those existing under The Public Schools Act.

In the Revised Statutes of Ontario, 1960,⁴ the provisions of the amendments of 1949 and 1954, were incorporated in The Schools Administration Act.

In 1964, Section 36 of The Schools Administration Act⁵ was amended to permit any board with more than three trustees to pay to each trustee, except trustees appointed to a board of education for secondary school purposes only, for each month an honorarium not exceeding an amount based on the average daily attendance of pupils in the schools operated by the board in the preceding year in accordance with a formula set out in the amendment and shown in Table 34.

The range of honoraria extended from a maximum of \$5 per month for a board with an average daily attendance of fewer than 60 pupils to a maximum of \$150 per month where the average daily attendance was 60,000 or more. In the case of a trustee appointed to a board of education, who was not entitled to vote on a motion that affected public schools exclusively, the board could pay an honorarium for each month not exceeding one-half of the amount provided in Table 35 based on the average daily attendance of pupils in all secondary schools operated by the board in the preceding year. The maximum mileage allowance for a board with more than three trustees was

³The Secondary Schools and Boards of Education Act, 1954, Statutes of Ontario, 1954, Chapter 87, Section 34, subsection (2) (b).

⁴The Schools Administration Act, R.S.O., 1960, Chapter 361, Section 36.

⁵The Schools Administration Amendment Act, 1964, Statutes of Ontario, 1964, Chapter 105, Section 8.

TABLE 34
HONORARIA FOR SCHOOL TRUSTEES
1964-1968

| Average Daily Attendance | Maximum Monthly Honarium |
|--------------------------------------|--------------------------------|
| Fewer than 60 | \$ 5 |
| 60 or more but fewer than 100 | 7 |
| 100 or more but fewer than 200 | 10 |
| 200 or more but fewer than 300 | 15 |
| 300 or more but fewer than 600 | 20 |
| 600 or more but fewer than 1,000 | 30 |
| 1,000 or more but fewer than 2,000 | 40 |
| 2,000 or more but fewer than 3,000 | 50 |
| 3,000 or more but fewer than 6,000 | 60 |
| 6,000 or more but fewer than 10,000 | 70 |
| 10,000 or more but fewer than 20,000 | 90 |
| 20,000 or more but fewer than 30,000 | 110 |
| 30,000 or more but fewer than 60,000 | 130 |
| 60,000 or more | 150 |

raised to ten cents per mile and was extended to include meetings of committees of the board as well as meetings of the board.

In 1966, amendments⁶ to Section 36 of The Schools Administration Act removed the restriction that precluded payment of honoraria to trustees unless there were more than three on a board and provided that a board might pay to its chairman, an additional honorarium not exceeding 25 per cent of the amount that might be paid to him as a trustee.

⁶The Schools Administration Amendment Act, 1966, Statutes of Ontario, 1966, Chapter 140, Section 7.

In 1968, by an amendment to The Schools Administration Act,⁷ provision was made to allow a maximum monthly honorarium to trustees in accordance with a formula based on enrolment of pupils with the school board on September 30 of the preceding year in all schools operated by the board on January 1 of the current year. (Table 35)

TABLE 35
HONORARIA FOR SCHOOL TRUSTEES
1968-1974

| <u>Enrolment</u> <u>September 30</u> <u>Preceding Year</u> | <u>Maximum</u> <u>Monthly</u> <u>Honorarium</u> |
|--|---|
| Fewer than 100 | 10 |
| 100 - 499 | 25 |
| 500 - 1,999 | 50 |
| 2,000 - 4,999 | 100 |
| 5,000 - 14,999 | 150 |
| 15,000 - 29,999 | 200 |
| 30,000 - 59,999 | 250 |
| 60,000 or more | 300 |

A board was allowed to determine by its own vote the amount to be paid up to the maximum limit. In the case of a trustee of a board of education who was not entitled to vote on a matter that affected public schools exclusively, the amount of the honorarium was based on the enrolment on September 30 in the preceding year in all secondary schools which, on January 1 of the current year, were operated by the board. Provision was made to permit a board to pay its chairman an additional honorarium not exceeding one-third, instead of the former one-quarter, of the honorarium paid to him as a trustee.

In the case of a trustee who represents his area board on the Metropolitan Toronto School Board, provision exists for payment of an additional sum not exceeding \$200 per month, or \$2,400 per year. For each member appointed by

⁷The Schools Administration Amendment Act, 1968, Statutes of Ontario, 1968, Chapter 121, Section 10.

the Metropolitan Separate School Board to the Metropolitan Toronto School Board, the corresponding allowance in \$100 per month or \$1,200 per year. The Chairman of the Metropolitan Toronto School Board may be paid an additional allowance not exceeding one-third of the allowance paid to him as a member of the Metropolitan Toronto School Board,⁸ or one-third of \$2,400, or \$800.

When The Education Act, 1974,⁹ was passed on December 20, 1974, it contained substantial revisions in the formula and in the amount of the maximum monthly honorarium permitted. The new formula is shown in Table 36.

TABLE 36
HONORARIA FOR SCHOOL TRUSTEES
1975

| <u>Enrolment on September 30 Preceding year</u> | <u>Maximum Monthly Allowance</u> | <u>Number of Boards in Category</u> |
|---|--|---|
| Fewer than 2,000 | \$100 | 69 |
| 2,000 - 9,999 | 200 | 54 |
| 10,000 - 39,999 | 400 | 41 |
| 40,000 or more | 600 | 14 ^a |

Note: ^a Metropolitan Toronto School Board not included.

The new formula increased by ten times, the maximum allowance permitted for trustees where the enrolment is fewer than 100 pupils. There are a relatively large number of boards in Northern Ontario in this category. Most of these operate one school and most have from one to four classrooms. The comparative figures and the amounts of the increases are shown in Table 37.

The new Act also discontinued the distinction, in as far as the honoraria

⁸The Municipality of Metropolitan Toronto Act, R.S.O., 1970, Chapter 295, Section 127 (f).

⁹The Education Act, 1974, Statutes of Ontario, 1974, Chapter 109, Section 164.

TABLE 37
TRUSTEE HONORARIA AND HONORARIA INCREASES
1974 and 1975

| <u>Enrolment September 30 Preceding Year</u> | <u>Monthly Maximum Allowable Honarium</u> | <u>Monthly Maximum Allowable Honarium</u> | <u>Amount of Monthly Increase</u> | <u>Percent Monthly Increase</u> |
|--|---|---|---|---|
| | <u>1974</u> | <u>1975</u> | <u>1975</u> | <u>1975</u> |
| Fewer than 100 | \$ 10 | \$100 | \$ 90 | 900 |
| 100 - 499 | 25 | 100 | 75 | 300 |
| 500 - 1,999 | 50 | 100 | 50 | 100 |
| 2,000 - 4,999 | 100 | 200 | 100 | 100 |
| 5,000 - 9,999 | 150 | 200 | 50 | 33 $\frac{1}{3}$ |
| 10,000 - 14,999 | 150 | 400 | 250 | 166 $\frac{2}{3}$ |
| 15,000 - 29,999 | 200 | 400 | 200 | 100 |
| 30,000 - 39,999 | 250 | 400 | 150 | 60 |
| 40,000 - 59,999 | 250 | 600 | 350 | 140 |
| 60,000 or more | 300 | 600 | 300 | 100 |

are concerned, between members of a board of education entitled to vote on a motion exclusively affecting public schools and those not entitled to vote on such a motion. Consequently, all members of a board of education are now entitled to the same honoraria.

The amount that a trustee may receive at the maximum allowable honorarium varies from a low of \$1,200 per annum where the enrolment is fewer than 2,000 to a maximum of \$7,200 per annum where the enrolment is 40,000 or more. For a small board with three trustees, the total maximum cost to the board is \$3,600, whereas for the largest board it could be a total of \$144,000 for a board with 20 trustees. In the case of the Metropolitan Toronto School Board and its area boards, the maximum allowable amounts for honoraria are shown in Table 38. In addition, a board may now pay to its chairman an allowance not exceeding one-half, instead of one-third as formerly, the allowance that may be paid to him as a board member.

In the case of the Metropolitan Toronto School Board, the Board may still

TABLE 38
HONORARIA TO SCHOOL TRUSTEES
IN METROPOLITAN TORONTO
1975

| <u>Board</u> | <u>Number of Trustees</u> | <u>Amount of Honorary per Trustee</u> | <u>Total of Honorary to Trustees</u> | <u>Chairman's Honorary</u> | <u>Total of Honorary</u> |
|--|-----------------------------------|---|--|--------------------------------|----------------------------------|
| East York | 10 (8 + 2) | \$4,800 | \$48,000 | \$2,400 | \$50,400 |
| Etobicoke | 12 (10 + 2) | 7,200 | 86,400 | 3,600 | 90,000 |
| North York | 16 (14 + 2) | 7,200 | 115,200 | 3,600 | 118,800 |
| Scarborough | 14 (12 + 2) | 7,200 | 100,800 | 3,600 | 104,400 |
| Toronto | 25 (22 + 3) | 7,200 | 180,000 | 3,600 | 183,600 |
| York | 10 (8 + 2) | 4,800 | 48,000 | 2,400 | 50,400 |
| Sub-total | 87 (74 + 13) | --- | 578,400 | 19,200 | 597,600 |
| Metropolitan Toronto School Board | 20 (17 + 3) 3 alternates | 2,400 (20) 1,200 (3) | 51,600 | 800 | 52,400 |
| Total | 87 | --- | 630,000 | 20,000 | 650,000 |
| Metropolitan Separate School Board | 21 | 7,200 | 151,200 | 3,600 | 154,800 |
| GRAND TOTAL | 108 | --- | 781,200 | 23,600 | 804,800 |

pay to trustees from the City of Toronto and the five boroughs that make-up the Metropolitan Toronto School Board an additional allowance of \$200 per month or \$2,400 per annum to each trustee. The latter Board may also pay an allowance of one-third the amount paid to the trustee chosen by its members to serve as chairman of the Metropolitan Toronto School Board. At the maximum, the sum is \$800 per annum. Similarly, for each member appointed by the Metropolitan Separate School Board, the allowance is still \$100 per month or \$1,200 per year.

The new Act permits payment to a member of the board, in respect of travel to and from his residence to attend a meeting of the board, or a committee thereof, that is held within the area of jurisdiction of the board, for expenses necessarily incurred therefor or such lesser amount as may be determined by the board. Alternatively, it may pay the member a mileage allowance at a rate determined by the board. In addition, a board may

authorize a member to travel on designated business of the board and may reimburse the member for his actual expenses incurred on business of the board, or such lesser amount as may be determined by the board.¹⁰

There are other allowances for which school trustees are eligible. For example, under The Income Tax Act, a proportion of the honorarium can be declared non-taxable for income tax purposes. Where this is done, a considerable additional benefit can accrue to the trustee, depending on the income tax bracket applicable to him. As well, boards are entitled, under The Education Act, to pay the travelling expenses and membership fees incurred by any member of the board in attending meetings of an educational association.

While each school board is entitled to establish the amount of the honorarium for a trustee at any level below the maximum permitted by the legislation, in actual practice the great majority of boards set the amount at the maximum allowable. The attitude seems to be that there must be justification for payment of the maximum since that amount has the endorsement of the Legislature. The effect is to relieve trustees to a considerable extent from the necessity to justify the establishment of their honoraria at the maxima amounts permitted by the legislation.

Determination of Honoraria for Trustees

It would in our view be preferable to remove the formula from the legislation and allow trustees to establish and justify the level of the honoraria to be paid to them. This practice is already operative with municipal councils and there seems no logical reason to treat school boards in a different manner.

There are, however, certain safeguards that should be built into the procedures for the determination of the amount of the honoraria to be paid to both councillors and trustees. It is our view that the amount of the honorarium to be paid to a member of either a council or a school board should be established by an open vote of the council or school board at the

¹⁰Ibid, Chapter 109, Section 164, subsections (2) to (4) inclusive.

October meeting of the year in which the municipal and school board elections are held. The salary established at that meeting should become effective on January 1 of the next year and should remain at that level until voted on again in October of the next election year. Under this procedure councillors and trustees would be held accountable for the decision made in October of the election year at the elections held in December of that year. They would not benefit personally unless their action was endorsed by their re-election. Elected representatives would receive stated honoraria for their term of office and they would know the amounts when they allowed their names to be on the ballot. This procedure would avoid the present too-common practice of increasing the honoraria immediately after an election with the hope on the part of the elected representatives that the voters will forget the action of their elected trustees by the end of the two-year term.

Financing of Honoraria for Trustees

The total amount of any honorarium paid to councillors or trustees should not be subject to legislative or other form of grant. The total amount paid to the elected representatives should be a charge against property taxes in the jurisdiction for which the representatives have been elected. This fact should be well publicized so that ratepayers will be aware of the impact on their taxes of honoraria paid to their representatives. This procedure is quite justified since the elected officials are there to represent their constituents, to serve their interests, and to be held accountable by them.

CHAPTER 10

PRIVATE SCHOOLS

Authority for Private Schools

Provision exists for the establishment and operation of private schools in Ontario. A "private school" is defined as an institution at which instruction is provided at any time between the hours of 9 a.m., and 4 p.m., on any school day for five or more pupils who are of or over compulsory school age in any of the subjects of the elementary or secondary school courses of study and that is not a school as defined in The Education Act, 1974.¹ The same Act sets out the conditions under which private schools may function in Ontario.²

Enrolment in Private Schools

The enrolment in private schools on the last school day in September, 1974, was 51,440. The numbers of transfers, retirements, and admissions during the school year 1973-74 are shown in Table 39. The net increase in enrolment during the period from September, 1973, to September, 1974, was 3,940. The enrolment trends for the period from 1967 to 1974 are indicated by the figures in Table 40. Over the eight-year span the total enrolment has increased by 8,454 students or 19.7 per cent. A considerable proportion of the increase is at the junior kindergarten and kindergarten levels. In each of grades 9 and 10 there has been a slight drop in enrolment, while in each of grades 11 and 12 there has been a slight increase. Grade 13 has shown a more significant increase, while the total of the ungraded commercial and other programs has increased slightly. Overall, the figures have remained relatively static. The enrolment of 51,440 in private schools in September, 1974, was approximately 2.6 per cent of the enrolment of 1,994,489 in public elementary and secondary schools. The numbers enrolled in the different types of private schools are given in Table 41.

¹The Education Act, 1974, Statutes of Ontario, 1974, Chapter 109, Section 1, subsection (1), paragraph 40.

²Ibid, Section 15, subsections (1) to (9) inclusive.

TABLE 39

PRIVATE SCHOOL ENROLMENT, TRANSFERS, RETIREMENTS, ADMISSIONS

1973-1974

| Enrolment on the last school day in September 1973 | Admissions since the last school day in September 1973 | |
|--|--|--|
| Transfers since the last day of September 1973 to another Private school | 47,500 | |
| Retirements since the last school day in September 1973 | | |
| To publicly supported schools | 1,554 | Beginners - pupils whose names were entered on the roll of a school for the first time |
| To other training or education Left Ontario | 5,172 | Pupils enrolled previously in another private school in Ontario |
| Ceased to attend any school | 5,802 | Pupils entering from publicly supported schools |
| Death, disability, marriage, other | 1,027 | Pupils re-entering after a period of non-attendance at any school |
| Total, retirements | 1,853 | Pupils from outside Ontario |
| | 128 | |
| | 13,963 ^a | |
| Total, retirements and transfers | 15,517 | Total, admissions |
| Total enrolment on the last school day in September 1974 | 51,440 | 19,457 |

^aNote: The Source is in error since addition of the retirement numbers totals 13,982, instead of 13,963. Since the other figures are in balance using 13,963, it is assumed that one of the figures under the heading of "Retirements" is incorrect.

Source: Education Statistics Ontario, 1974, p. 106.

TABLE 40

PRIVATE SCHOOL ENROLMENT BY GRADE AND YEAR

| Grade | 1967 to 1974 ^a | | | | | |
|--|---------------------------|--------|--------|--------|--------|--------|
| | 1967 | 1968 | 1969 | 1970 | 1971 | 1972 |
| Junior Kindergarten | 1,169 | 1,168 | 1,532 | 1,462 | 1,629 | 1,487 |
| Kindergarten | 940 | 971 | 997 | 1,017 | 1,056 | 1,010 |
| 1 | 1,994 | 2,078 | 2,128 | 2,224 | 2,075 | 2,071 |
| 2 | 2,018 | 1,932 | 2,036 | 2,126 | 2,214 | 2,062 |
| 3 | 1,806 | 1,942 | 1,961 | 2,139 | 2,229 | 2,221 |
| 4 | 1,826 | 1,790 | 2,000 | 2,060 | 2,160 | 2,250 |
| 5 | 1,811 | 1,851 | 1,907 | 2,163 | 2,207 | 2,277 |
| 6 | 1,711 | 1,829 | 1,896 | 2,046 | 2,296 | 2,360 |
| 7 | 1,950 | 1,891 | 2,053 | 2,308 | 2,421 | 2,572 |
| 8 | 1,921 | 2,028 | 1,968 | 2,188 | 2,354 | 2,480 |
| Ungraded other | 129 | 357 | 216 | 123 | 147 | 417 |
| Total, Elementary | 17,275 | 17,837 | 18,694 | 19,856 | 20,788 | 21,207 |
| Secondary | | | | | | |
| 9 | 2,524 | 2,146 | 2,081 | 1,982 | 2,026 | 2,229 |
| 10 | 2,280 | 2,038 | 2,018 | 1,896 | 1,826 | 1,875 |
| 11 | 8,666 | 8,077 | 7,747 | 7,703 | 7,015 | 7,406 |
| 12 | 7,873 | 6,998 | 7,185 | 6,927 | 6,853 | 6,896 |
| 13 | 4,092 | 4,264 | 4,629 | 4,778 | 4,972 | 4,897 |
| Ungraded Commercial | 164 | 105 | 103 | 55 | 97 | 62 |
| Ungraded Other | 112 | 139 | 200 | 919 | 372 | 254 |
| Total Secondary | 25,711 | 23,767 | 23,963 | 24,260 | 23,161 | 23,619 |
| Grand Total | 42,986 | 41,604 | 42,657 | 44,116 | 43,949 | 44,826 |
| Note: ^a As of the last school day in September. | | | | | | |
| Source: Educational Statistics Ontario, 1974, p. 108. | | | | | | |

TABLE 41
PRIVATE SCHOOL ENROLMENT BY TYPE OF SCHOOL
September, 1974

| <u>Type of School</u> | <u>Number of Schools</u> | <u>Enrolment</u> | | | <u>Percentage Distribution of Total Enrolment</u> |
|------------------------------|------------------------------|------------------|---------------|--------------|---|
| | | <u>Male</u> | <u>Female</u> | <u>Total</u> | |
| Boys' schools | | | | | |
| Day pupils only | 15 | 4,462 | | 4,462 | 8.7 |
| Boarders only | 5 | 202 | | 202 | 0.4 |
| Day pupils and boarders | 11 | 3,163 | | 3,163 | 6.1 |
| Total, boys' schools | 31 | 7,827 | | 7,827 | 15.2 |
| Girls' schools | | | | | |
| Day pupils only | 20 | | 5,303 | 5,303 | 10.3 |
| Boarders only | 1 | | 41 | 41 | 0.1 |
| Day pupils and boarders | 7 | | 888 | 888 | 1.7 |
| Total, girls' schools | 28 | | 6,232 | 6,232 | 12.1 |
| Co-educational schools | | | | | |
| Day pupils only | 231 | 16,341 | 15,734 | 32,075 | 62.4 |
| Boarders only | 4 | 41 | 34 | 75 | 0.1 |
| Day pupils and boarders | 22 | 2,086 | 3,145 | 5,231 | 10.2 |
| Total co-educational schools | 257 | 18,468 | 18,913 | 37,381 | 72.7 |
| All schools | | | | | |
| Day pupils only | 266 | 20,803 | 21,037 | 41,840 | 81.4 |
| Boarders only | 10 | 243 | 75 | 318 | 0.6 |
| Day pupils and boarders | 40 | 5,249 | 4,033 | 9,282 | 18.0 |
| Total, all schools | 316 | 26,295 | 25,145 | 51,440 | 100 |

Source: Education Statistics Ontario, 1974, p. 110.

Inspection of Private Schools

The Act provides for inspection of a private school. The Minister of Education may direct that one or more supervisory officers visit the school, in which case each such supervisory officer may enter the school at all reasonable hours and conduct an inspection of the school and any records or documents relating thereto, and every person who prevents or obstructs or attempts to prevent or obstruct any such entry or inspector is guilty of an offence and on summary conviction is liable to a fine of not more than \$200.³ It is our view that this authority is essential to ensure that, where there is reason to believe that a student's education in a particular private school is being adversely affected, this fact can be made known to parents and the public. For this reason the safeguard of the right to inspect is justified.

There is also provision whereby the Minister of Education may, on the request of any person operating a private school, provide for inspection of the school in respect of the standard of instruction in the subjects leading to the Secondary School Graduation Diploma and to the Secondary School Honour Graduation Diploma, and may determine and charge a fee for such inspection.⁴ It is in the exercise of this optional provision that a number of questions arise.

Private schools are usually established to provide an alternative to the public system of education, although some are founded as commercial enterprises to be operated for financial profit. Some of those in the first category have been in existence for many years and have acquired an enviable reputation for the quality of their programs and some of them have provided a highly satisfactory environment for resident students. Some of those operated for profit are also providing good educational experiences for children, particularly in areas requiring programs to meet the special needs of pupils. It is desirable that parents have the right to have their children educated outside the public system of education

³ Ibid, Section 15, subsection (6).

⁴ Ibid, Section 15, subsection (7).

provided they assume responsibility for the alternative. However, it seems to be a contradiction that private schools operating as an alternative to the public system should then request that inspection be carried out by supervisory officers appointed by the Minister of Education. Inevitably, these officials will assess the programs they observe in the light of their experiences with programs in the public system. In the knowledge that this will be so, teachers in the private schools are likely to be influenced to adopt practices, procedures, content, and methods similar to those in the public system. When this happens, the major justification for the private school - as an alternative to the public system - is either removed or substantially lessened.

There are several reasons why private schools request inspection by officials of the Ministry of Education. Parents who might be concerned about the "standards" of the private schools are reassured if the private school advertises that it is inspected by officials of the Ministry. This enables the private school to attract students who might otherwise not enroll. The confidence of parents in the Ministry's assessment should not really be dependent on the inspection since it is limited in terms of time and perfunctory in the extent of the evaluation that is possible.

The fact that inspected private schools are allowed to recommend students for the Secondary School Graduation Diploma and the Secondary School Honour Graduation Diploma issued by the Ministry of Education also reassures parents and students that the private school program is acceptable. But adoption of the Ministry's curriculum guidelines by the private school is another factor that tends to duplicate the programs of the public system rather than provide an alternative to them. Private schools that are inspected can also recommend students for the Ontario Scholarship. This award requires an average of 80 per cent on a stated number of credits at the Grade 13 level and carries with it a certificate of designation as an Ontario Scholar and a cash payment of \$100. Under these conditions there is a real limitation on the ability of the private schools to develop and implement creative, innovative, experimental, and different programs. Consequently, the private schools that request inspection are working at cross purposes, in so far as the attainment of the objective of an alternative to the public system is concerned.

It is our view that justification for the existence of private schools in Ontario depends on a number of factors. First, they should provide a viable and educationally acceptable alternative to the public system. For example, in the pursuit of this objective, their independence should enable them to be innovative, experimental, and creative in the development of programs and courses that might be more difficult to introduce in publicly-supported schools. They should be able to emphasize the inculcation of values that they accept but which might be impossible to teach to the more heterogeneous population of a school in the public system. They should avoid becoming a pale imitation of other schools in Ontario, or elsewhere, where the student body, teaching staff, facilities, and circumstances are quite different.

Secondly, private schools should establish their own criteria and standards for quality education and should attract students on the basis of their success in the attainment of those objectives and not by advertising the fact that they conform to the inspection requirements of the Ministry of Education in Ontario. They should build a reputation for excellence with their students, the parents of their students, and with the post-secondary institutions which receive their graduates, rather than relying on the fact that their inspected schools can recommend students for the Secondary School Graduation Diploma or the Secondary School Honour Graduation Diploma. Each private school should strive to have its own graduation certificate accepted as the equivalent or better when compared with the two diplomas awarded by the public system. In addition, each private school should make its own special awards for scholarship and high achievement in other aspects of its programs at a level equivalent to or better than the Ontario Scholarship. Unless it is able to establish its unique characteristics, a private school will have surrendered much of its reason for being and will have missed its opportunity to provide a quality of education unavailable by any other means.

Basic to the attainment of the goals outlined above is a degree of independence to enable the achievement of those goals. In their own interests, private schools should abandon their requests for inspection by supervisory officers of the Ministry of Education and their reliance on the paper standards represented by the graduation diplomas and the Ontario Scholarship of

the public system. The Ministry of Education should not limit the role which private schools might fulfill by involving itself in their affairs through inspection, even when the request originates with the private schools.

There is a cost factor associated with the request for and provision of inspection by supervisory officers of the Ministry of Education. Each inspected school is required to pay a nominal inspection fee so that there is some cost to the private school. The Ministry of Education must engage supervisory officers in its Regional Offices to carry out the requested inspections. For the province as a whole, the time required is substantial, particularly in the Toronto area where a number of the larger private schools are situated. Since the salary of an official of the Ministry involved in the inspection is in the range of \$25,000 to \$30,000 it is estimated that, including benefits, secretarial assistance, etc., the minimum cost of provision of inspection across the province is \$200,000 per annum. For the reasons already given, it is in our view not only an unnecessary expenditure but probably an undesirable one as well.

Unique Private Schools

There are a few private schools that are especially unique and that call for some comment. The special circumstances that apply to each are outlined below.

(a) The University of Toronto Schools

The University of Toronto maintains, as an integral part of the Faculty of Education, a special school educating students from Grade 7 to the Secondary School Honour Graduation Diploma, granted after successful completion of Grade 13. This is the University of Toronto Schools. It has two main roles: to provide an academic education for boys and girls with above-average ability and to assist the Faculty in the training of student teachers by providing practical experience in the classroom.⁵ The history of U.T.S., goes back to 1908, when the Board

⁵The University of Toronto Schools, Prospectus, 371 Bloor Street West, Toronto.

of Governors of the University of Toronto decided to establish elementary and secondary schools so that students of the new Faculty of Education, which began operation in 1910, might have opportunities for practice-teaching.

U.T.S., maintains an enrolment of 420 students. Admission is by competitive examination held annually. Approximately 70 students are admitted each year and places are open to both boys and girls.

U.T.S., has been financed mainly by a per capita grant from the Ontario Ministry of Colleges and Universities, through the University of Toronto. In 1974-75, the amount was \$425,000. In 1975-76, the grant amounted to \$500,000 and for 1976-77, it is projected at \$550,000. Based on the stated enrolment of 420 students, the per student grants for the three years are \$1,012, \$1,190 and \$1,310 respectively. There is also a fee of \$320 per year to be paid by the parent. For 1976-77, the total support will be approximately \$1,630 per student. Consequently, for 420 students, the estimated cumulative amount will be \$684,400.

There are a number of reasons why the continuance of U.T.S., as a largely publicly-supported school cannot be justified. First, the need that existed for a practice-teaching facility when the school was established in 1910 can now be met by many schools in the Metropolitan Toronto area and in adjoining educational jurisdictions. Secondly, the competitive admission requirements mean that the student body is made up of a select and academically-oriented high-achievement group. It does not, therefore, provide a practice-teaching experience of the type to be encountered by beginning teachers after graduation from the Faculty of Education. Thirdly, the program is almost exclusively oriented towards academic subjects whereas the great majority of secondary schools in Ontario are composite high schools offering a broad range of programs and courses across the whole spectrum of the curriculum. Therefore, the practice-teaching experience at U.T.S., is not representative of the school organization and curriculum in the schools where graduates of the Faculty of Education will teach. For these reasons, it would be more realistic to have practice-teaching assignments made to schools more representative of the kinds of

experience prospective teachers are likely to meet after graduation.

The element of cost is another important factor to be considered in the operation of U.T.S. If the students in Grades 7 to 13 at U.T.S., were in attendance at the schools within the jurisdictions where they reside, the cost of providing their education would be relatively small compared with the cost of operation of U.T.S. The addition of a small number of students to each of a large number of schools would not in most cases require any additional staff over the number already employed. At the present time, U.T.S., is a private school supported to a large extent by public funds. This is a serious contradiction of the stated policy of the Ontario Government that public funds must not be used to support private schools. We are in agreement with the provincial policy but believe the government should not permit the anomaly represented by financial support to U.T.S., however indirect or circuitous the method for provision of the funds may be. It is our view that the province should discontinue its financial support for U.T.S., and in the process effect an economy of \$500,000 or more per year.

There are other reasons why provincial support to U.T.S., is unjustified. There are many other private schools in Ontario which must charge a substantially-higher fee than U.T.S., because they must compensate for the grant made by the province to U.T.S. This gives an unfair advantage to U.T.S., and creates a considerable disadvantage for other schools offering an educational program of comparable quality. In addition, for students of comparable ability who choose, for a variety of reasons, to attend private schools other than U.T.S., there is the additional cost represented by the provincial contribution per pupil to U.T.S., but not available to them. On an even broader basis, all taxpayers are required to contribute to the support of an exclusive educational institution to which their children are not admissible even though it is at a level where education is considered to be universally available to all who wish to pursue it..

(b) Neuchâtel Junior College

Neuchâtel Junior College is a private school situated in the City of

Neuchâtel, Switzerland, about twenty miles east of the French Border. It has been in operation since 1936 and has been established as an entirely separate department under the control of the Department of Public Instruction of a Canton in Switzerland.⁶ At the same time, it is designated as a private school in Ontario and regularly requests that it be inspected by supervisory officers of the Ministry of Education for Ontario. The principal and several other members of the staff are originally from Ontario. The school offers a program largely equivalent to the academic Grade 13 in Ontario. The courses are designed to permit Canadian and United States students to complete their last year of secondary school in Europe, or to help high school graduates to earn advanced credit for the university of their choice.⁷

The College uses the fact that it is inspected by supervisory officers of the Ministry of Education for Ontario to attract students, to recommend students for the Secondary School Honour Graduation Diploma, and to recommend students for the Ontario Scholarship. For these purposes, it is treated like any private secondary school in Ontario.

There are, however, substantial differences that do not justify the College's designation as a private school in Ontario. The first is that it is situated in a foreign country and is under the control of the Department of Public Instruction for the Canton of Neuchâtel. There is serious doubt about the legal authority for the Ministry of Education in Ontario to inspect schools outside its territorial jurisdiction. The Education Act, 1974, is a statute of the Legislature of Ontario and as such does not empower the Ministry of Education to designate a school in a foreign country as a private school in Ontario. The further right of the Minister of Education to designate supervisory officers in the employ of the Ministry of Education to carry out official inspections of schools in another country under the jurisdiction of an educational agency of that country is even more

⁶Neuchâtel Junior College, Neuchâtel, Switzerland, Prospectus.

⁷Neuchâtel Junior College, Supplement to prospectus, Neuchâtel, Switzerland.

open to question. The authority to award the official Secondary School Honour Graduation Diploma, as provided for in the Regulation based on the Ontario statute, to graduates of Neuchâtel Junior College on the recommendation of the principal of a private school situated in another country is far from clear. The further action of awarding the Ontario Scholarship to graduates of the College is probably illegal. In one recent year the College stated that more than one-third of its class of one hundred and eight were awarded the Ontario Scholarship. Certainly, the authority for the payment by the Ministry of Education of any costs associated with the salary of supervisory officials while they are engaged in inspection of Neuchâtel Junior College, their travelling and living expenses for this purpose, and the payment of the award of \$100 to each graduate designated as an Ontario Scholar is not clearly established. Nor does the small fee for inspection of a private school reimburse the Ministry of Education for Ontario for the costs of providing the inspection, particularly for the portion of the supervisory officer's salary and other benefits represented by the time spent on the inspection.

In addition, it is quite possible that diplomas may be awarded, Ontario Scholars designated, and payment of \$100 made to students from other provinces of Canada or to students from the United States who have never resided in Ontario or have never had any association with Ontario. When these things happen, it seems that the generosity of the taxpayers in Ontario is being exploited beyond all reasonable limits and that the time to call a halt has long passed. It is our view, therefore, that the Ministry of Education for Ontario should disassociate itself from any involvement with Neuchâtel Junior College in Switzerland.

(c) Canadian Junior College

The Canadian Junior College is situated in Lausanne, Switzerland. It identifies itself as an independent Canadian institution open to North American men and women students.⁸ Two academically-oriented programs

⁸Canadian Junior College, Lausanne, Switzerland, Prospectus.

are offered by the College, allowing students to complete the requirements of the Ontario Grade 12 or Grade 13 curricula or their equivalent. Methods of instruction at the College are those practised at university level. Students from provinces other than Ontario are admitted.

The Canadian Junior College also conducts a Research Centre for Studies in Marine Sciences and Oceanography in Carriacou in the Grenadines in the Caribbean Sea. It is an extension of the College in Lausanne, Switzerland. It is open to North American men and women students and offers two programs at the Grade 12 and 13 levels.

In its prospectus the College states that the Lausanne College operates "within the jurisdiction of the Ontario Ministry of Education. Approval and inspection of its courses by the Ministry is requested on an annual basis. Admission to university for Grade 13 graduates will be determined on the same basis as obtains in any secondary school." Similar statements are made in the prospectus regarding the program at Carriacou.

It is our view that the comments already made about Neuchâtel Junior College are almost equally applicable to the operations of the Canadian Junior College at Lausanne and Carriacou. We believe, therefore, that the Ministry of Education for Ontario should disassociate itself from these institutions as well.

CHAPTER 11

GRADE 13

The Ontario school system is unique in the fact that it offers within its secondary schools a year's program designated as Grade 13. The origin of this grade level goes back to the latter quarter of the nineteenth century when secondary school education became an integral part of the public school system. In rural areas and smaller communities, after successful completion of the High School Entrance Examination, students often stayed on in the elementary school for one or two additional years in the Fifth Class. The program was intended to be the equivalent of the first two years of a high school and indeed all students in these two years took common external Departmental tests, known as Lower School examinations.

A number of elementary school boards went further and established Continuation School boards. The schools in these units offered two additional years intended to be equivalent to the third and fourth year of a high school. Again, all students in these years wrote a set of uniform external Departmental tests known as the Middle School examinations. Both the Fifth Classes and the Continuation Schools were introduced to provide an opportunity for students who so desired to continue their education while living at home or in a nearby community. Otherwise, many of these students would have had to drop out of school.

In larger centres, high schools were established with a greater number of staff who usually held higher qualifications than teachers in the Continuation Schools. These factors permitted a greater degree of subject specialization than was possible in the Continuation Schools where two or three teachers attempted to teach all the subjects offered. Where the staff was especially well qualified, a high school was permitted to be designated as a Collegiate Institute. For the same reasons that Fifth Classes and Continuation Schools were established in smaller communities to permit students to further their education near their homes, a fifth year was conducted in high schools and collegiate institutes. Otherwise, most students would have had to leave home to attend one of the small number of universities then in existence. The fifth year was designated as Upper School. Uniform, external Departmental examinations were also

conducted for the Upper School and, while they were gradually abandoned for the first four years of the secondary school, they persisted in Grade 13 until 1968. In the post-elementary programs the first year was named "First Form" and so on with the fifth year designated as "Fifth Form". It was much later when the grade designation was applied to the five years of the secondary school program.

There is little doubt that the Fifth Classes and Continuation Schools provided an opportunity for students to secure education that would not otherwise have been available to them. Quite a number of the graduates of the Continuation Schools went on to the Normal Schools to train as elementary school teachers. Others went to the Fifth Form and some of these ultimately went to university. While the numbers proceeding to post-secondary education in those days represented a very small proportion of the total age-group when compared with the numbers today, they were nevertheless much greater than would have been the case if Fifth Classes and Continuation Schools had not been provided.

Abolition of Grade 13 Examinations

With abolition of the uniform, external Departmental examinations in Grade 13, an opportunity was provided to eliminate some of the undesirable features of the Grade 13 year. There had been a considerable emphasis on rote learning of content for reproduction on the examination paper. This applied not only in subjects such as history and geography but also in mathematics and science through memorization and application of formulae, often with little understanding of the process. While no one denigrates or downgrades the necessity for knowledge of content, the nature of the external examinations, with their emphasis on recall of facts, ensured that a disproportionate amount of time was devoted to this aspect of the program. Since the success of students and the professional reputation of teachers depended to a considerable extent on the results of the Grade 13 examinations, it was understandable that they would place great emphasis on memorization. Awareness of the importance of content for its own sake was reflected in an inordinate emphasis on a study of past examination papers and the preparation of model answers in the hope that the same question or questions would be repeated in the next examination the following June.

There was, too, an increasingly important viewpoint that the ability to think with facts and to use facts to solve problems should be major objectives of the educational program. This position presupposed a knowledge of content but it did not stop there. If external examinations were developed to incorporate these objectives, it would be most difficult to assess answers that might vary widely from student to student with several possible answers being equally acceptable. No marking scheme could take the many possibilities into account in anything like the way examinations could when based on recall of historical events, description of geographic circumstances, or memorization of mathematical and scientific formulae. For these and other reasons, the external examinations dictated what could be done educationally rather than assisting in the achievement of more desirable educational goals.

The necessity for schools and teachers to have their students achieve good results in the Grade 13 examinations prompted many schools to eliminate, in the years before Grade 13, any student who was a possible failure if admitted to Grade 13. Consequently, for the most part, only those about whom the teachers guessed wrongly in Grades 9 to 12 inclusive became failures in Grade 13.

The Grade 13 uniform, external examinations themselves increasingly became the subject of considerable questioning. Because they were uniform, there was no way that the great variations in the quality of the teaching could be adequately taken into account in the assessment of the student's performance. Consequently, students in schools with few or no highly-qualified teachers were judged on the same basis as other students in schools with the best qualified teachers. The inability of school boards to engage the best teachers, largely because there was a shortage of them, became a liability for the student for which he was not responsible and about which he could do nothing.

The determination of the marking scheme for the examination was highly suspect. A tentative scheme for each subject was developed and then tried out on a sampling of papers. If too many failed or passed, the scheme was adjusted until the appropriate percentage passed. This was usually around 80 to 85 percent of the applicants with variations from year to year in each

subject. The statistical manipulations to achieve the desired results did nothing to inspire confidence in the validity and fairness of the examinations.

Two other factors extraneous to education itself ultimately resulted in abolition of the examinations. The great increase in enrolment in the secondary schools meant that so many examinations were written in June that it was impossible to get them all marked and the results processed soon enough for universities to carry out their admissions and planning for the academic session beginning in September. The other factor was the increasing cost of conducting the examinations. The multiplicity of subject committees, the increase in the number of markers, and the administrative machinery necessary to conduct the examinations resulted in a cost of substantial proportions. Questions arose about the utilization of the money in this manner. When to these factors was added a growing doubt about the educational value of the examinations themselves, there existed a climate that permitted their discontinuance.

Grade 13 Since 1968

The abolition of the Grade 13 uniform external examinations provided an opportunity for educational improvements in a number of ways. Relieved of the necessity to "cover" a body of content to the exclusion of almost every other objective, teachers were able to pursue some topics much more deeply than the superficial treatment formerly accorded them. No longer was it necessary to abandon a topic at the point where students were interested and desirous of discovering more about it. There was now room for groups of students or the individual student to work on different topics at the same time. The teacher had an opportunity to become more of a resource person rather than a lecturer. The possibility for teacher: student planning of the class program was greatly enhanced and the provision for the joint development of evaluative criteria made relatively easy. Continuous assessment of each student's progress became an attainable goal without almost total reliance on the final, external, uniform examination.

The possibilities envisioned in 1968 have been realized in considerable measure in many schools and classrooms across Ontario. There is evidence

that the year in Grade 13 is a sound educational experience for many students. But it would be unrealistic and misleading to claim that the objectives have been realized in all Grade 13 classrooms to the same extent or at the highest level. There are still Grade 13 classes functioning almost as if the uniform, external examinations were still operative. The only difference is that local examinations of the same type have replaced the former model and the methods and practices are continuing as if nothing had changed. This is not surprising since it would be expecting too much to think that a new philosophy and direction could be implemented uniformly well in the relatively short time represented by the period since 1968. But there is evidence that through workshops, seminars, and staff discussions many teachers are more aware of individual differences among students, of the necessity for more humane relationships between teachers and students, and of the necessity for more innovative, creative, and experimental approaches to solve new problems, to meet new circumstances, and to adopt to new societal, economic, political and cultural developments. For other teachers, there is a growing recognition that the solutions to current problems are not likely to be found in a return to practices, procedures, and methods which may have served their day well but which were discarded for good and sufficient reasons. There are, of course, those teachers who have implicit confidence in the continuance of the methods that they feel have worked successfully for them. It will then take time to come closer to the ideal that is the unrealized goal of every good teacher for his or her students. While it may be difficult to display the necessary patience in the face of the rapid and cataclysmic alterations in the society, there are limits to the pace with which educational changes can be realized. Hopefully, the necessary adaptations in education can be made fast enough to keep the school abreast of the society in which it functions. This requires that the general public, parents, school trustees, teachers, supervisors, and administrators recognize that better education must be adaptive, innovative, creative, experimental and forward-looking if it is to be relevant.

Grade 13 To-day

Critics of the inclusion of Grade 13 as part of the public secondary school organization offer a number of reasons why it should be abolished. Supporters of the Grade 13 year as a desirable part of the school experience offer

counter arguments. Some of the points made by proponents of the two sides of the issue are presented below.

- (a) The critic makes the point that Ontario is now the only province that requires Grade 13 for secondary school graduation and that no equivalent jurisdiction in the United States requires it.

The counter argument is that the non-existence of a similar year in other school systems is by itself irrelevant. It may well be that Ontario has a valuable educational experience that should not be abandoned merely to conform to practice elsewhere.

- (b) The critic states that graduates of Grade 12 in other jurisdictions are admitted to college or university, including some universities in Ontario, whereas secondary school graduates in Ontario are required to have Grade 13 for admission to Ontario universities.

The supporter of Grade 13 points out that graduates of Grade 12 in the United States go on to college and take a four-year program leading to the Bachelor of Arts degree. Graduates of Grade 13 in Ontario go on to university and complete the equivalent pass or general Bachelor of Arts degree in three years. Therefore, the number of years required to complete the Bachelor of Arts degree after Grade 12 is the same in Ontario as in the United States. As for Grade 12 graduates from other provinces being eligible to enroll in Ontario universities, it is pointed out that the great majority of university entrants in each province go on to universities in their own provinces. It is true that there will always be some students of high academic ability who graduate from Grade 12 and who can make the necessary adjustments to pursue programs at Ontario universities. But these represent a small proportion of those entering university in any year. For several years the University of Guelph and Brock University have made special provision for students to enroll in their institutions without having completed fully the program for the Secondary School Honour Graduation Diploma. Each of the University of Ottawa and the University of Windsor have conducted Preliminary Year programs as alternatives to the Grade 13 year.

- (c) The critic asks why it takes thirteen years in Ontario to complete secondary school graduation while in other provinces and states it takes only twelve years.

The answer is that it does not necessarily require thirteen years to complete requirements for secondary school graduation in Ontario. A considerable proportion of the student body in Ontario does manage to complete the program in twelve years. The abolition or deemphasis on grade boundaries in the elementary schools allows many students to progress at rates that are normal for them and that enable them to gain a year before the completion of Grade 8. Consequently, those who are academically able to achieve at a faster rate are permitted to do so while those who may be less academically oriented are not pushed beyond the level of their ability. This is a most important and significant point and one that is inherent in the principle of individual differences among students. All too often it is ignored by those who seem to assume that all students should achieve at the rate of the most able. Any such expectation is unrealistic in terms of what is known about the way children grow and develop, about the way they learn, and about the distribution of academic ability among the total population.

In addition, most secondary schools have become far more flexible in their organizational pattern than was formerly the case. For example, in a growing number of school systems, the provision of summer schools, the credit system, and the choice that an able student has to take an extra option each year combine to make it possible to complete the secondary school program in four years if the student so desires. Again, however, other students may choose to take their academic program at a slower rate and to engage in other educational experiences which they believe contribute to their total development.

- (d) The critic believes that abolition of the Grade 13 year would achieve a substantial financial saving for the taxpayer.

The counter argument is that certain assumptions would have to be accepted before any economy would be realized and that those assumptions

are unacceptable for a number of reasons. The first is that the critic assumes that the program at the Grade 13 level can be dispensed with completely and the graduates of Grade 12 can undertake the university program as if they had completed Grade 13. This assumption is apparently not shared by the universities. For example, during the strike of secondary school teachers in the Metropolitan Toronto area in the latter half of November, December, and the early part of January of the school year 1975-76, there was concern that students from that area would have the possibility of their admission to university in the fall of 1976 jeopardized by the fact that they had missed part of their year. The Council of Ontario Universities was specific about this matter as the following quotation indicates:

"In regard to the impact of school closures on the preparation of students for higher education, the universities expect that the affected schools and students will make every effort to rectify any academic deficiencies that may result. Otherwise students may be inadequately prepared, particularly in subjects which are prerequisites for university courses.

The Council wishes to emphasize, under present circumstances, that all offers of admission to be made in June are as usual conditional. The universities reserve the right to withdraw early offers if the applicant has not satisfactorily completed the required academic work by the end of the school year."¹

It seems, therefore, that, if the universities are unwilling to dispense with the academic preparation provided during a part of the year at the Grade 13 level, they would be unlikely to accept a pattern whereby it would not be provided at all.

If this conclusion is valid, abolition of Grade 13 would require some type of preparatory program within the universities to compensate for the lack of preparation now provided in Grade 13 in the secondary schools. The universities have always complained about the inadequacy of the preparation of the graduates from Grade 13 to pursue university work so that it seems inevitable that they would be even less satisfied with the graduates from Grade 12. Since some of them have established "remedial" courses for entrants who have completed Grade 13, it

¹Clarke, G. Grant, "Admission to Ontario Universities for September 1976," Memorandum issued by Council of Ontario Universities, Toronto, February 16, 1976.

would seem that they would have to go much further in offering similar programs to Grade 12 graduates.

The costs of any such undertaking in the university context would be much greater to the taxpayer and to the individual student. For example, instructional accommodation in the universities could not in the near future absorb the influx of graduates of both Grade 13 and Grade 12 in the same year. The magnitude of this problem is indicated by the fact that, in 1974, there were 51,074 students enrolled in Grade 13 and 103,609 in Grade 12 (Table 42). More space would have to be provided in the universities while the accommodation now occupied by Grade 13 students would become surplus. Those graduates of Grade 12 who live in centres where there is no university would be required to live away from home for an additional year with all that that means in terms of added cost for accommodation, food, and travel. The financial implications for several Ontario universities where housing accommodation both in the universities and in their communities is already in short supply would be difficult if not impossible to meet. Construction of additional residences to meet the demand of increased enrolments would be difficult to justify, particularly when it is largely an organizational change that is involved.

The relative quality of the educational program in the university is also a matter for concern. There is no assurance that substitution of a first-year program in the university for Grade 13 in the secondary school would result in better instruction or a more satisfactory educational experience. Indeed, the possibility that the opposite would be true is very real. While all teachers in the secondary school are required to have a minimum of one year of professional preparation, those assigned to Grade 13 classes are usually among the most experienced and successful in the school. By comparison, only rarely does an academic staff member in a university possess any professional teaching preparation. While the university staff member is usually more highly qualified academically, he all too often assumes that this background compensates for his lack of professional preparation taken by the certificated teacher. The validity of this assumption is at least open to serious question. But, in addition, in the university

SECONDARY SCHOOL ENROLMENT,

1955 to 1974 INCLUSIVE

(as of last school day in September)

| Year | Intermediate Division | | Senior Division | | Vocational ¹ courses | Total | | Grand Total |
|------|-----------------------|---------|-----------------|---------|------------------------------------|--------|-----------|----------------|
| | Year 1 | Year 2 | Year 3 | Year 4 | | Year 5 | Secondary | |
| 1955 | 61,911 | 45,251 | 31,489 | 23,846 | 10,799 | 1,266 | 174,562 | 1,038,176 |
| 1956 | 66,354 | 48,640 | 32,830 | 25,041 | 11,487 | 1,253 | 185,605 | 1,097,501 |
| 1957 | 72,063 | 53,654 | 37,177 | 26,769 | 12,547 | 1,315 | 203,525 | 1,174,642 |
| 1958 | 74,604 | 59,109 | 41,718 | 31,058 | 14,278 | 1,308 | 222,075 | 1,249,673 |
| 1959 | 76,598 | 60,829 | 45,552 | 34,792 | 16,267 | 3,538 | 237,576 | 1,319,225 |
| 1960 | 88,607 | 64,783 | 47,833 | 38,697 | 18,447 | 4,408 | 262,775 | 1,389,163 |
| 1961 | 100,988 | 76,290 | 52,681 | 42,266 | 21,482 | 5,470 | 299,177 | 1,462,230 |
| 1962 | 103,866 | 86,012 | 61,733 | 46,776 | 23,750 | 9,441 | 331,578 | 1,528,607 |
| 1963 | 103,526 | 90,817 | 70,302 | 55,731 | 26,262 | 17,572 | 364,210 | 1,597,374 |
| 1964 | 105,899 | 93,453 | 77,922 | 64,418 | 32,770 | 20,839 | 395,301 | 1,673,774 |
| 1965 | 110,997 | 96,299 | 80,710 | 67,282 | 37,692 | 25,758 | 418,738 | 1,738,781 |
| 1966 | 117,582 | 100,710 | 83,963 | 70,625 | 35,007 | 28,139 | 436,026 | 1,800,897 |
| 1967 | 124,067 | 108,789 | 88,988 | 75,214 | 36,472 | 30,206 | 463,736 | 1,868,788 |
| 1968 | 131,082 | 117,425 | 98,585 | 82,371 | 40,087 | 31,257 | 500,807 | 1,931,397 |
| 1969 | 135,420 | 122,181 | 105,836 | 90,956 | 43,569 | 32,717 | 530,679 | 1,986,796 |
| 1970 | 153,826 | 139,961 | 116,116 | 98,837 | 48,173 | - | 556,913 | 2,022,401 |
| 1971 | 157,433 | 141,939 | 121,750 | 101,733 | 51,665 | - | 574,520 | 2,031,360 |
| 1972 | 162,781 | 143,459 | 125,417 | 100,644 | 50,712 | - | 583,013 | 2,028,114 |
| 1973 | 165,235 | 143,939 | 126,596 | 99,854 | 50,101 | - | 585,725 | 2,008,610 |
| 1974 | 161,775 | 145,651 | 127,541 | 103,609 | 51,074 | - | 589,650 | 1,994,489 |

Note: ¹Beginning in 1970, enrolment in all secondary school courses was distributed in accordance with a wider definition of grade. Students were reported by grade or by years of schooling beyond kindergarten or by credits or courses completed. In 1972, those with 0-6 credits were reported in grade 9, those with 7-13 credits in grade 10, those with 14-20 credits in grade 11, those with 21-26 credits in grade 12. Candidates registered for honour graduation diploma courses were reported in grade 13.

Source: Education Statistics Ontario, 1974, Ministry of Education, Ontario, Queen's Printer and Publisher, Toronto, 1975, p. 38.

there is a tendency to appoint lecturers or junior professorial staff to teach first-year courses. While there are notable exceptions to this practice, usually by choice of the individual professor, nevertheless the general rule is that the least experienced staff members are assigned to courses for beginning students. In Grade 13 classes the maximum enrolment in any subject is not likely to exceed 40 students with most classes having far fewer than this number. In first-year university the number of students in many classes far exceeds this number to the point where classes have to be held in auditoria to accommodate the number enrolled. The degree of student participation in discussion, in the opportunity to raise questions, and the variety of instructional techniques available to the teacher are far more restricted with the large numbers. In addition, the possibility afforded to the professor to know his students on an individual basis is greatly reduced. Given these circumstances it is difficult to believe that, in general, the university could provide a superior educational experience to that offered in Grade 13.

If the Grade 13 were discontinued in the secondary school, there would be a large number of teachers whose services would no longer be required. Because the staff, who at present are teaching these classes, usually have longer experience and are among the more successful members of the profession, they would be retained by their boards. Younger staff members, many of whom have high academic qualifications, would be released because of the reduced enrolment represented by those who would normally have taken courses at the Grade 13 level. When to this situation is added the inevitable decline in enrolment in the secondary school for several years in the future, it becomes apparent that only a few new teachers would need to be recruited from the graduates of the education faculties for a considerable period of time. The result for the secondary schools could be to reduce the positive effects of the introduction of new academic knowledge and ideas, to lose the impact of the most modern concepts and practices in teaching which new entrants to the profession bring to their jobs, and to forego the benefits of their enthusiasm and desire for success in their profession. In addition, the existing staff would be relatively static with the average age constantly increasing. These latter factors

would have implications in terms of the school's ability to relate to the young people in the schools. The morale of the staff is likely to deteriorate in a relatively static organization with consequent impact on the quality of the instructional program for students.

Cost of Grade 13

It is difficult to separate out from the total budget for the secondary school the proportion of the cost attributable to the provision of Grade 13 classes. Most teachers who have classes at this level also teach some classes in their subject areas to students in Grades 9 to 12 inclusive. The allocation of costs for operation, maintenance, equipment, and supplies for Grade 13 classes conducted in various parts of the building require arbitrary decisions difficult to justify. The amount of the annual repayment on debentures for a secondary school that should be charged to the Grade 13 program is in the same category. Nevertheless, attempts have been made on a provincial basis to assess the operating costs for a number of years.

As far back as 1966, negotiations were being conducted between the Federal government and the provinces regarding Federal support for post-secondary educational institutions. Ultimately, it was agreed that the Federal authority would make a fiscal transfer to the provinces using as one formula 50 per cent of the operating costs of post-secondary institutions. Ontario was permitted to include operating expenditures for Grade 13 in the public educational system and the other provinces the final year of their secondary school systems. The total agreement was incorporated in The Federal-Provincial Fiscal Arrangements Act.

To qualify for the portion of the fiscal transfer represented by 50 per cent of the operating costs of Grade 13, Ontario was required to determine those costs. In 1967, the first year in which the formula applied, Ontario estimated the operating costs for Grade 13 to be \$33,000,000. Consequently, the fiscal transfer in that year was \$16,500,000. In 1974, the cost had risen to \$83,102,776, so that the fiscal transfer was \$41,551,388. The increase in cost during the period could be attributed in large part to a 25 per cent increase in enrolment, a substantial inflationary factor, and higher teachers' salaries.

Money received by the province from the Federal government through a fiscal transfer using the operating costs attributable to Grade 13 is placed in the Consolidated Revenue Fund of the province. It need not be and is not earmarked specifically for use to meet the costs of conducting Grade 13 classes. Nevertheless, the additional money in the Consolidated Revenue Fund has some bearing on the amount of general legislative grants that the province can pay to school boards. If it can be assumed that the general legislative grants to secondary school boards in Ontario are greater by the amount of the fiscal transfers, then only half of the direct operating costs of Grade 13 are borne by taxpayers in Ontario. The same taxpayers, of course, contribute through their Federal taxes a good proportion of the fiscal transfer from the Federal government.

Conclusion

Any decision about the future of Grade 13 should be based on a full knowledge of the information and data available and of the probable impact on students, the total educational program, and the secondary schools and post-secondary institutions. Most of the dialogue that has been carried on in recent years is ill-informed or non-informed, offers a simplistic approach to a rather complex issue and ignores the educational and financial implications for students, educational institutions, and society. We have attempted to identify some of the factors that should be considered in any study of the place of Grade 13 in Ontario education. These and other considerations should be explored in depth so that the public may be more fully aware of the many significant facts and facets of this issue.

APPENDIX

FACTS ABOUT
THE PUBLIC SCHOOL SYSTEM OF
METROPOLITAN TORONTO

The Board of Education for the Borough of East York
The Board of Education for the Borough of Etobicoke
The Board of Education for the Borough of North York
The Board of Education for the Borough of Scarborough
The Board of Education for the City of Toronto
The Board of Education for the Borough of York
The Metropolitan Toronto School Board

December 15, 1976

"The combined resources of the entire area are to be made available to support education and to overcome the most serious inequities of the present situation where some parts of the area do not have the financial resources required to provide even the bare essentials in the way of education while others, because of the concentration of non-residential assessment or for other reasons, have taxable resources which in comparison are much greater than their needs."

Report of the Ontario Municipal Board (Lorne R. Cumming -- Chairman)
which recommended the establishment of a Metropolitan form of govern-
ment, January 20th, 1953.

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THE METROPOLITAN TORONTO SCHOOL BOARD

The Metropolitan Toronto school system was implemented to make the financial assets of the whole Metropolitan region available, on an equitable basis, to every Area Board of Education. Since its inception in 1953, The Metropolitan Toronto School Board has had, as its primary purpose, the task of guaranteeing that the total financial resources of the community are used to give every student in Metro the best possible educational opportunities. Equitable financial distribution is the responsibility of the School Board; ownership of facilities and equipment and operation of the school system are the prerogatives of the Area Boards. Exceptions to this general rule are the Schools for the Mentally Retarded which are owned and operated by The Metropolitan Toronto School Board.

Composition

The Metropolitan Toronto School Board is composed of trustees from the six Area Boards plus representatives of the separate school ratepayers. The number of representatives is based on the size of each area. The trustee members of the six Area Boards are elected publicly by wards every two years, at the same time as their municipal colleagues. The Chairman of each Area Board automatically becomes a member of The Metropolitan Toronto School Board upon his election. The present composition of The Metropolitan Toronto School Board is as follows:

| <u>Area Boards of Education</u> | <u>Number of Members and Alternates</u> |
|---------------------------------|---|
| East York | 1 + 1 (Chairman plus one alternate) |
| Etobicoke | 2 + 1 (Chairman plus one representative plus an alternate) |
| North York | 4 (Chairman plus three representatives) |
| Scarborough | 3 (Chairman plus two representatives) |
| Toronto | 6 (Chairman plus five representatives) |
| York | 1 + 1 (Chairman plus an alternate) |
| | <hr/> 17 + 3 Alternates |
| Separate School Ratepayers | 3 |
| | <hr/> |
| Total: | 20 + 3 Alternates |

Members of the 1976 Metropolitan Toronto School Board and its Standing Committees

| | |
|--------------------|--|
| ACADEMIC COMMITTEE | |
|--------------------|--|

| | |
|-------------------|--|
| FINANCE COMMITTEE | |
|-------------------|--|

| | |
|----------------------------|--|
| BUILDING & SITES COMMITTEE | |
|----------------------------|--|

| | |
|-----------------------------------|--|
| METROPOLITAN TORONTO SCHOOL BOARD | |
|-----------------------------------|--|

| | |
|--|--|
| ADVISORY COMMITTEE Schools for Retarded | |
|--|--|

| | |
|--------------------------------|--|
| COMMITTEE OF BOARD CHAIRMAN | |
|--------------------------------|--|

| | |
|----------------------|--|
| CHAIRMAN'S COMMITTEE | |
|----------------------|--|

These 17 members, together with the three representatives of the separate school ratepayers of the Metropolitan area¹ comprise The Metropolitan Toronto School Board. The Board meets regularly twice a month throughout the school year and once per month during the summer.

A fundamental purpose of The Metropolitan Toronto School Board is the division of revenue available from the whole Metropolitan area among the Area Boards. This is accomplished through the annual preparation of an overall education budget (capital and current) for the entire region. The budget is designed to strike a realistic balance between the actual education needs in the Area Boards and an acceptable level of property tax for the ratepayers. Educational programs are necessarily financed within the limits of financial feasibility. The Composite Capital and Current Budgets are calculated through a variety of formulae developed by the School Board, including the Ceiling Cost Formula for the Capital Program, the Staff Allocation Formula, and various account Classification Formulae for the Composite Current Budget. The main purpose of basing these budgets of formulae is to ensure equitable distribution of available funds among the Area Boards in response to their educational and operational needs.

In recent years, the negotiation of salaries and fringe benefits for teaching and non-teaching staff has become another important activity for the School Board. This is undertaken at the request of, and on behalf of, the Area Boards and is accomplished through the Committee of Board Chairmen.

Functions

The School Board on behalf of the Area Boards conducts a continuous review of school support. In Ontario, Roman Catholics may designate their school taxes to support either the public or separate elementary school system.

¹ Roman Catholics in the Province of Ontario may elect to enrol their children in schools (similar in type to parochial schools) administered by the Separate School Board. Separate schools are state-supported and provide an educational program at the elementary school level which may include Grades 9 and 10. Ratepayers who support the separate school are given representation on the public education authorities concerning secondary school matters because their taxes support Grades 9 to 13 of the public school system.

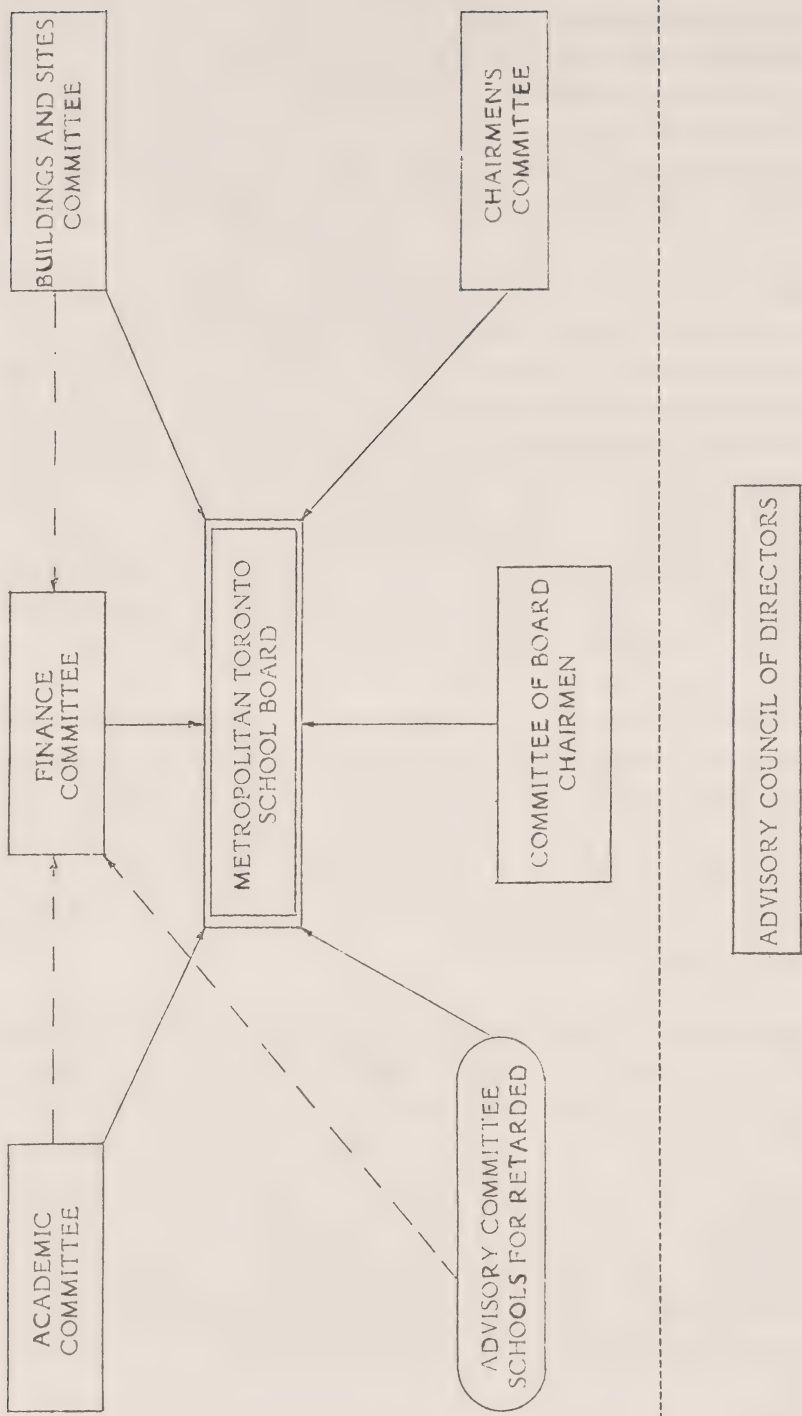
All "resident" pupils are entitled to free attendance in the public elementary school system unless their parents or guardians are separate school supports. The designation of tax support is made at the time of the annual enumeration each September. Such a process inevitably involves a number of errors. It is the function of the School Support Review Officers to assist both the individual taxpayer and the public school taxpayers generally by ensuring that those Roman Catholics who wish to support the public elementary school system, are correctly recorded as public school supporters.

A responsibility of the School Board which is little publicized is the operation of certain special education programs throughout Metro. These include the Schools for the Mentally Retarded as well as transportation for deaf and/or blind children to provincial institutions. The operation of the Schools for the Retarded is the responsibility of The Metropolitan Toronto School Board. Staff for these schools is selected and employed directly by the School Board. Other programs, such as those for the deaf and the orthopaedically handicapped are operated by the Area Boards on behalf of The Metropolitan Toronto School Board, and are open to students from all parts of the Metropolitan region.

Each of the above functions is carried out by a specific "department"(s) within the School Board which, in turn, works with special committees consisting of staff representatives from the Metro and Area Boards. In many instances, departments work together on the solution of a problem. For example, the superintendents of academic programs and academic studies and the finance department provide supportive services for salary negotiations and staff allocation discussions.

The Committees of the School Board are designated as either "standing" committees or "appointed" committees. Standing committees are required by the School Board's by-laws; appointed committees are formed as the need arises to deal with specific concerns. Only trustees may serve on standing committees; they also sit on appointed committees, sometimes with outside consultants and School Board staff who act as resource personnel. Standing committees include: The Committee of Board Chairmen (a Committee composed of the Chairman of the School Board, the Chairman of each area board of education and one person appointed by and from the members of the School Board

COMMITTEE ORGANIZATION OF THE METROPOLITAN TORONTO SCHOOL BOARD



Committees of staff representatives from the School Board and Area Boards deal with matters such as Personnel, Budget Formula Review, Computer Services, Planning, and Inner City Schools.

who are appointed by the Metropolitan Separate School Board), Buildings and Sites, Finance, Academic and Chairmen's (composed of the chairmen of other standing committees and the Chairman and Vice-Chairman of the School Board). The appointed committees include: The Advisory Committee, Schools for the Retarded; and other ad hoc committees which review policy or liaise with other agencies. Whereas the standing committees are established under the School Board's by-laws, the Advisory committee, Schools for Retarded differs in that it is required by provincial legislation.

The relationship of the various committees to the School Board is indicated on the chart titled "Committee Organization of The Metropolitan Toronto School Board". The composition and functions of each major committee are outlined in the following pages.

THE FINANCE COMMITTEE

The Finance Committee submits recommendations to The Metropolitan Toronto School Board on all matters which have financial implications. Specifically, it is responsible for the following:

- (a) It reviews and reports on the financial aspects of all recommendations emanating from the standing and special committees of the School Board.
- (b) It gives consideration to financial statements and reports respecting the operations of The Metropolitan Toronto School Board and the Schools for Retarded.
- (c) One of its major responsibilities is the review of current estimates received from the Area Boards of Education and the consolidation of these estimates, together with those of the School Board, into the Composite Current Budget which is subsequently submitted to the Metropolitan Council.
- (d) It reviews and recommends with respect to the legislation governing the operations of the School Board and the amendments which are proposed by the Provincial Government, as well as those which are initiated locally. The Committee also reviews and recommends appropriate

amendments to the by-laws of the School Board.

The Composite Current Budget

During the latter part of the calendar year the budget formulae are reviewed, revised as necessary, and approved for use in the preparation of next year's composite current budget. After the Provincial grant regulations are reviewed and analyzed, the formulae are used to generate total budget targets for each Area Board. The Area Boards then prepare their detailed budgets within the target totals and submit these to the School Board for approval. These budgets are reviewed by the Advisory Council of Directors, the Finance Committee and ultimately by the School Board. During this review process, Area Boards may make representations concerning special needs which cannot be met within the target amounts. Toward the end of April, after all the necessary adjustments have been made, the School Board gives final approval to the Composite Current Budget.

Through this budget process, the School Board establishes the total amount of money to be spent for educational purposes during the year. The approved estimates of the School Board are then submitted to the Metropolitan Council which has the responsibility to raise those funds which will not be provided by provincial grants. The Council raises its share of the educational revenue through a uniform municipal tax levy against the assessment of the whole Metropolitan Toronto area.

THE BUILDINGS AND SITES COMMITTEE

In general, the Buildings and Sites Committee is responsible for:

- (a) recommending to the School Board an annual capital program and all individual applications of Area Boards for the provision of temporary and permanent accommodation and the acquisition of school sites;
- (b) recommending to the School Board revisions to the Ceiling Cost Formula; and consideration of the comments of Area Boards pertaining to proposed plans of subdivision, amendments to Official Plans, and amending by-laws and recommending same to the School Board.

Composite Capital Program

- Each year Area Boards of Education are responsible for the preparation and submission to the School Board in October of a capital program for the ensuing year as well as a five year capital program.
- The projects proposed for inclusion in the Composite Capital Program are categorized by the staff of the School Board according to type of project and urgency of need; the proposed Composite Capital Program is then presented to the Buildings and Sites Committee for its consideration and recommendation to the School Board.
- Area Boards are given the opportunity to make presentations relative to the projects and the categorization of them to the Buildings and Sites Committee.
- The approved Composite Capital Program and five-year capital program are submitted to the Executive Committee of the Metropolitan Council and the Ministry of Education.
- Subsequently, individual site and building applications along with supporting data are submitted by Area Boards to the Buildings and Sites Committee for recommendation to the School Board.

THE ACADEMIC COMMITTEE

Academic matters that are of common concern across the Metropolitan area are processed to the School Board through the Academic Committee. Items considered by this Committee were staff allocation, inner city schools, provision of transportation for blind and deaf students, the question of increased accommodation for deaf students, expansion of existing educational provisions for blind pupils, in-service training, the co-operative outdoor education program with The Metropolitan Toronto and Region Conservation Authority, Metropolitan attendance areas, non-resident fees and regulations, and matters pertaining to Special Education.

THE CHAIRMEN'S COMMITTEE

(The organization of this Committee is currently under review by the School Board.)

The By-law also provides that the Committee shall meet at the call of the Chair, to consider such matters as may be referred to it by the School Board, or by the Chairman of the School Board, and to submit recommendations thereon.

THE COMMITTEE OF BOARD CHAIRMEN

Composition

This Committee consists of eight trustees with full voting powers, plus the seven members of the Advisory Council of Directors who serve in a non-voting advisory capacity. The eight trustees include the following members:

- The Chairman of The Metropolitan Toronto School Board
- The Chairman of each area Board of Education (six)
- One representative of the Separate School Ratepayers who is a member of the School Board.

In the event that a representative of the Separate School Ratepayers is elected Chairman of an Area Board of Education, the trustee named by that Area Board to serve on The Metropolitan Toronto School Board in his place shall serve on the Committee of Board Chairmen.

Functions

The evolution towards the present responsibilities has been developing since 1952. In that year, suburban trustees began informal cooperation in salary matters and were joined in 1953 by the City of Toronto. With the formation of The Metropolitan Toronto School Board in 1953, this informal co-operation continued. In 1953, The Metropolitan Toronto School Board appointed a Salary Committee (forerunner of the present Committee of Board Chairmen) at the request of the Scarborough Board of Education. In 1967, the Metropolitan Salary Committee assumed formal responsibility for

developing a common salary schedule through local negotiations. On September 10, 1968, the name of the Salary Committee was changed to that of the Committee of Board Chairmen. For the past several years this Committee has been given full and final responsibility by the Area Boards of Education and The Metropolitan Toronto School Board to conduct negotiations for salary schedules and fringe benefit packages and to reach agreement with teacher groups in Metropolitan Toronto. In recent years the Committee has also established guidelines for the negotiation of salary scales and fringe benefit packages for the non-teaching staff. All agreements are subject to final approval by the Area Boards and The Metropolitan Toronto School Board.

THE ADVISORY COMMITTEE - SCHOOLS FOR RETARDED

This Committee is responsible for recommending to the School Board on matters pertaining to the planning and operation of programs for the mentally retarded in 21 locations in the Metropolitan Toronto area. It consists of three members of The Metropolitan Toronto School Board and three representatives appointed by the Metropolitan Toronto Association for the Mentally Retarded. The Committee advises the School Board on the management of the schools. It considers the financial, program and staff affairs of the schools, and makes recommendations to The Metropolitan Toronto School Board concerning these matters.

The most fundamental function of the Committee is to establish the scope and objectives of the programs offered in the schools. These are designed so that the programs are compatible with those operated by the Metropolitan Toronto Association for the Mentally Retarded. Long-range plans are expressed in the capital program for site acquisition and new and renewed facilities. This program is reviewed annually in light of changes in demand and resources.

The bulk of the items on most committee agendas concern the day-to-day details of the schools' operations. Matters of supplies, transportation, cleaning and maintaining the buildings and equipment are considered. All appointments of teaching and non-teaching staff are reviewed by the committee.

Research projects on innovative programs in the schools for retarded are also operated under the auspices of this Committee.

ADVISORY COUNCIL OF DIRECTORS

The By-laws of the School Board require that the Advisory Council of Directors consist of the Directors of Education of the City and Borough Boards of Education and the Director of The Metropolitan Toronto School Board. The Advisory Council is required to:

- (a) report on matters referred to it by the School Board;
- (b) report and recommend on any matter which in the opinion of the Council requires consideration of the School Board;
- (c) join with the Director of The Metropolitan Toronto School Board in the review of such matters within his responsibilities as he may wish to refer to the Council.

Chairmanship of the Council rotates monthly among the Directors. Council meets at least one-half day per week.

The work of the Council is supported by a number of staff committees with staff representation from the various Area Boards and The Metropolitan Toronto School Board. These committees deal with a broad range of topics of Metro-wide concern. All reports from the various staff committees are reviewed by the Advisory Council of Directors prior to submission to the appropriate committee of the School Board. The following committees have a regular schedule of meeting:

Academic Personnel
Educational Research
Financial Officials
Inner City

Chairman
H.J. Vallery
Rotating
R.I. Thorman
A.S. Merritt

| | <u>Chairman</u> |
|---|-----------------|
| Outdoor Education | A.S. Merritt |
| Personnel and Labour Relations | H.R. Farrell |
| Psychological Services | Rotating |
| Planning | F.G. Ridge |
| Renovation - Replacement | F.G. Ridge |
| Special Education | A.S. Merritt |
| (a) Students with Communication Problems | A.S. Merritt |
| (b) Committee for Students with Physical Disabilities | F.J. Reynolds |
| (c) Special Program (Vision) | F.J. Reynolds |
| Staff Allocation (Elementary) | A.S. Merritt |
| Staff Allocation (Secondary) | A.S. Merritt |
| Salary Negotiations (Elementary) | H.J. Vallery |
| Salary Negotiations (Secondary) | H.J. Vallery |

Committees that meet infrequently include:

| | |
|---|---------------|
| Adult Continuing Education | H.J. Vallery |
| Animal Care | A.S. Merritt |
| Ceiling Cost Formula | F.G. Ridge |
| In-Service Training Courses | H.J. Vallery |
| Group Life Insurance - Joint Management | D.A. Morrison |
| Night School and Summer School | H.J. Vallery |
| Non-Resident Fees and Regulations | H.J. Vallery |
| P.P.B.E.S. Steering Committee | R.I. Thorman |
| Student Enrolment | R.I. Thorman |
| Technical Plant | G. Dabbs |
| Attendance Areas | H.J. Vallery |

The Budget Formulae Review Committee meets frequently during some parts of the year. Its work is supported by thirteen sub-committees:

| | |
|--|-----------------|
| Budget Formulae Review Committee | H.J. Vallery |
| (a) Special Courses and Continuing Adult Education | N.J. Hurley |
| (b) Data Processing | H.R. Montemurro |

| | |
|--|--------------|
| (c) Furniture, Equipment, Supplies and Rentals | H.J. Vallery |
| (d) Maintenance and Permanent Improvements | P. Tirion |
| (e) Outdoor Education | A.S. Merritt |
| (f) Plant Operations | P. Tirion |
| (g) Psychological and Pupil Welfare Services | A.S. Merritt |
| (h) Transportation | A.S. Merritt |
| (i) Para-Professionals | A.S. Merritt |
| (j) Revenue | R.I. Thorman |
| (k) Program and Supervision | A.S. Merritt |
| (l) Metrication | A.S. Merritt |
| (m) Inner City Committee | A.S. Merritt |

There is also a special study committee for Teacher Education in Reading.

| | |
|---|--------------|
| Resource Committee for Teacher Education in Reading | A.S. Merritt |
|---|--------------|

ENROLMENT

| Boards | Elementary | | Secondary | | Total | |
|-------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|
| | September 30th 1975 | September 30th 1976 | September 30th 1975 | September 30th 1976 | September 30th 1975 | September 30th 1976 |
| East York | 10,058 | 10,010 | 4,902 | 5,033 | 14,960 | 15,043 |
| Etobicoke | 33,878 | 31,443 | 22,157 | 22,016 | 56,035 | 53,459 |
| North York | 64,126 | 60,155 | 35,781 | 36,198 | 99,907 | 96,353 |
| Scarborough | 56,207 | 54,903 | 30,721 | 31,755 | 86,928 | 86,658 |
| Toronto | 60,987 | 58,465 | 36,528 | 36,849 | 97,515 | 95,314 |
| York | 14,172 | 13,676 | 8,484 | 8,577 | 22,656 | 22,253 |
| Metro | -- | -- | 1,347* | 1,303* | 1,347 | 1,303 |
| | 239,428 | 228,652 | 139,920 | 141,731 | 379,348 | 370,383 |

* Schools for Retarded are operated under the secondary school panel.

NUMBER OF EMPLOYEES

September 30, 1976

| <u>Elementary School Instructional Staff</u> | <u>East York</u> | <u>Etobicoke</u> | <u>North York</u> | <u>Scarborough</u> | <u>Toronto</u> | <u>York</u> | <u>Metro</u> | <u>Total</u> |
|--|------------------|------------------|-------------------|--------------------|----------------|-------------|--------------|--------------|
| Principals and Vice-Principals | 33 | 128 | 167 | 201 | 209 | 43 | | 781 |
| Teachers | 426.7 | 1,458.5 | 2,506 | 2,483 | 3,084.5 | 670 | | 10,629 |
| Coordinators and Others | 8 | 2 | 10 | 22 | 18 | 6 | | 66 |
| | | | | | | | | 11,476 |
| <u>Secondary School Instructional Staff</u> | | | | | | | | |
| Principals and Vice-Principals | 11 | 56 | 101 | 73 | 77 | 17 | 10 | 345 |
| Teachers | 300.5 | 1,286.5 | 2,371.5 | 1,904 | 2,261 | 516.5 | 158 | 8,798 |
| Coordinators and Others | 4 | 8 | 11 | 9 | 17 | 3 | | 52 |
| | | | | | | | | 9,195 |
| <u>Non Instructional Staff</u> | | | | | | | | |
| Schedule II | 15 | 57 | 140 | 111 | 174.5 | 33 | 34 | 564.5 |
| Schedule I | 98 | 384 | 688 | 589 | 826 | 157 | 39 | 2,781 |
| | | | | +38* | +27** | | +2* | +40* +27** |
| Trades (combined) | 11 | 56 | 165 | 71 | 392 | 130 | 35 | 860 |
| | | | | | +139** | | | +139** |
| Caretakers | 101 | 423 | 859 | 571 | 862 | 192 | 27 | 3,035 |
| Professional Student Services Personnel | 5.5 | 9 | 64 | 38 | 97 | 9 | 2 | 224.5 |
| | | | | | +26** | | | +26** |
| Others | 27 | 213 | 62 | 95 | 391 | 7 | 4 | 799 |
| | | | | | +42** | | +9** | +51** |
| Totals | 1,040.7 | 4,081 | 7,144.5 | 6,167 | 8,409 | 1,783.5 | 309 | 28,935 |
| | | | | | +234** | | +2**+9** | +40**+243** |

* half-time employees

** part-time, occasional employees

NUMBER OF SCHOOLS AS OF SEPTEMBER 30, 1976

| <u>BOARDS</u> | <u>ELEMENTARY</u> | <u>INTERMEDIATE</u> | <u>SECONDARY</u> | <u>TOTAL</u> |
|---------------|-------------------|---------------------|------------------|--------------|
| East York | 16 | 5 | 3 | 24 |
| Etobicoke | 61 | 12 | 19 | 92 |
| North York | 116 | 29 | 20 | 165 |
| Scarborough | 105 | 16 | 23 | 144 |
| Toronto | 97 | 13 | 32 | 142 |
| York | 23 | 6 | 7 | 36 |
| Metro | --- | -- | 10* | 10 |
| | 418 | 81 | 114 | 613 |

* Schools for Retarded are operated under the secondary school panel. In addition, integrated classes are found in 11 other locations.

CAPITAL PROGRAM AND FINANCING FOR
THE METROPOLITAN TORONTO SCHOOL BOARD

1967 - 1976

| Year | Annual Capital Program Amounts Approved By The School Board | | | | Financing Particulars | | | |
|------|--|--------------|--------------|--------------|-----------------------|-------------|----------------------------------|--------------|
| | Elementary | | Secondary | | Debtenture | | Capital From Current Expenditure | |
| | Elementary | Secondary | Total | Elementary | Secondary | Total | Elementary | Secondary |
| 1967 | \$38,727,196 | \$42,469,546 | \$81,196,742 | \$21,967,699 | \$13,798,447 | \$4,528,980 | \$5,128,292 | \$45,423,418 |
| 1968 | 63,490,000 | 4,006,146 | 67,496,146 | 28,029,000 | 10,461,000 | 3,526,615 | 7,139,644 | 49,156,259 |
| 1969 | 60,159,249 | 20,525,199 | 80,684,448 | 44,365,000 | 18,700,000 | 6,930,769 | 8,038,218 | 78,033,987 |
| 1970 | 45,695,454 | 13,303,094 | 58,998,548 | 10,953,000 | 6,521,000 | 5,616,834 | 7,700,670 | 30,791,504 |
| 1971 | 23,641,657 | 27,184,527 | 50,826,184 | 29,166,000 | 4,203,000 | 5,711,475 | 8,067,474 | 47,147,949 |
| 1972 | 19,853,368 | 20,616,787 | 40,470,155 | 23,478,000 | 8,830,000 | 5,817,961 | 8,011,287 | 46,137,248 |
| 1973 | 9,486,459 | 9,082,600 | 18,569,059 | 10,450,000 | | 4,819,543 | 7,211,621 | 22,481,164 |
| 1974 | 12,428,071 | 11,739,962 | 24,168,033 | 6,422,000 | 8,474,000 | 2,604,811 | 2,819,314 | 20,320,125 |
| 1975 | 11,271,366 | 7,144,634 | 18,416,000 | 3,100,000 | 2,900,000 | 7,176,137 | 7,101,542 | 20,277,679 |
| 1976 | 9,593,293 | 10,916,561 | 20,509,854* | 3,291,000 | 2,624,000 | 8,101,923 | 2,256,622 | 16,273,545 |

* Not approved by Ministry of Education

1976 COMPOSITE CURRENT BUDGET FOR
THE METROPOLITAN TORONTO SCHOOL BOARD AND
THE AREA BOARDS OF EDUCATION

| <u>Expenditures</u> | <u>Elementary</u> | <u>Secondary</u> | <u>Total</u> |
|--|----------------------|----------------------|----------------------|
| Salaries and Wages | \$ 267,206,739 | \$ 240,876,080 | \$ 508,082,819 |
| Employee Benefits | 14,259,588 | 11,779,474 | 26,039,062 |
| Supplies and Services | 26,032,659 | 28,338,657 | 54,371,316 |
| Replacements and Rentals | 1,323,145 | 1,920,713 | 3,243,858 |
| Principal Repayment of Debentures | 7,931,451 | 6,184,900 | 14,116,351 |
| Interest Payments on Debenture Debt | 20,256,358 | 9,190,199 | 29,446,557 |
| Provision for a Reserve For Financing a Portion of the Capital Program | 3,122,000 | 5,968,000 | 9,090,000 |
| Funds for Financing a Portion of the Capital Program | 2,387,641 | 1,101,187 | 3,488,828 |
| Current Area Board Funds for Capital Purposes | 7,202,177 | 6,645,615 | 13,847,792 |
| Fees and Contractual Services | 9,170,327 | 7,073,026 | 16,243,353 |
| Transfer to Other Boards | 292,565 | 605,787 | 898,352 |
| Other | 4,476,074 | 3,619,325 | 8,095,399 |
| | <u>\$363,660,724</u> | <u>\$323,302,963</u> | <u>\$686,963,687</u> |

Sources of Revenue

| | | | |
|------------------------|----------------------|----------------------|----------------------|
| Local Property Taxes | \$246,730,523 | \$197,608,279 | \$444,338,802 |
| Provincial Grants | 95,300,000 | 94,000,000 | 189,300,000 |
| Fees and Other Revenue | 21,630,201 | 31,694,684 | 53,324,885 |
| | <u>\$363,660,724</u> | <u>\$323,302,963</u> | <u>\$686,963,687</u> |

DISTRIBUTION OF ASSESSMENT, EXPENDITURE AND

ENROLMENT BY BOROUGH

| | <u>1976 Total Assessment</u> | | <u>1976 Budgeted Expenditures</u> | | <u>Enrolment September 30, 1976</u> | |
|-------------|------------------------------|------------------|-----------------------------------|------------------|---|------------------|
| | <u>Elementary</u> | <u>Secondary</u> | <u>Elementary</u> | <u>Secondary</u> | <u>Elementary</u> | <u>Secondary</u> |
| | % | % | % | % | % | % |
| East York | 4.07 | 4.02 | 4.07 | 3.47 | 4.36 | 3.58 |
| Etobicoke | 15.11 | 15.30 | 13.84 | 15.29 | 13.86 | 15.68 |
| North York | 23.45 | 23.96 | 25.45 | 25.07 | 26.28 | 25.78 |
| Scarborough | 13.59 | 13.52 | 21.62 | 21.05 | 24.00 | 22.61 |
| Toronto | 39.76 | 38.79 | 29.19 | 28.98 | 25.53 | 26.24 |
| York | 4.02 | 4.41 | 5.83 | 6.14 | 5.97 | 6.11 |
| | 100.00 | 100.00 | 100.00 | 100.00 | 100.00 | 100.00 |
| | | | | | | |
| | \$6,376,259,214 | \$7,120,545,797 | \$328,425,707* | \$294,612,685* | 209,890 | 140,428** |

* Excludes Metropolitan Toronto School Board expenditures.

** Excludes Trainable Retarded

SCHOOLS FOR RETARDED*

| | |
|---|---------------------------------------|
| Number of Schools: | 8 plus programs in 13 other locations |
| Number of Students: | 1,303 |
| Number of Teachers: | 158 |
| Number of Principals, Vice- Principals and Consultants | 20 |
| Number of Teaching Aides | 78 |

*As of September 30, 1976

1976 BUDGET ALLOCATION FOR THE SCHOOLS
FOR RETARDED, METROPOLITAN TORONTO SCHOOL BOARD

| <u>Expenditures</u> | <u>Amounts</u> |
|--------------------------|-------------------|
| Instruction | \$3,869,025 |
| Administration | 60,519 |
| Plant Operations | 481,172 |
| Plant Maintenance | 88,665 |
| Pupil Transportation | 666,765 |
| Pupil Services | 25,523 |
| Educational Services | 81,103 |
| Other | 17,500 |
| Total Gross Expenditures | <hr/> \$5,290,272 |
| Revenue | 255,378 |
| Total Net Expenditures | <hr/> \$5,034,894 |

COMMITTEE ON THE COSTS OF EDUCATION

Staff Members

| | |
|----------------|---|
| J. R. McCarthy | Executive Director |
| S. Bacsalmasi | Superintendent of Planning and Development York County Board of Education |
| F. A. Danna | Assistant Superintendent of Business and Finance Halton County Board of Education |
| T. David | Senior Statistician Ministry of Education |
| J. M. Ramsay | Director of Education Simcoe County Board of Education |

